Travel Activities & Motivation Survey

Interest in Health Spas Profile Report

TAMS
Travel Activities & Motivation Survey

December, 2001

Lang
RESEARCH

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Travel Activities & Motivation Survey

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...on behalf of...

Atlantic Tourism Partnership

Canadian Tourism Commission

Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade & Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food & Rural Affairs

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Interest in Health Spas

- Executive Summary -

American travellers were 66.7% more likely to have visited a health spa while travelling during the past two years than Canadians, and 61.2% more likely to express an interest in visiting a health spa during the next two years. Clearly, American travellers exhibit a greater interest in this sort of vacation experience than Canadian travellers. In Canada, those from Saskatchewan were the most likely to have visited a health spa while U.S. health spa, visitors were most often from New England and the Pacific/Hawaii regions.

Canadian women were 47% more likely to have visited a health spa during the past two years, and twice as likely as men to be interested in visiting a health spa during the next two years. By contrast, gender differences were almost non-existent in the United States. However, in both Canada and the United States, Affluent Mature Singles were the most likely to have visited a health spa while travelling during the past two years, while Affluent Young Singles were also frequent spa visitors in the United States (but not Canada). Overall, the level of formal education and household income were only weakly associated with health spa visits or interest in health spas.

Individuals who have visited a health spa while travelling during the past two years were more likely to have sought personal indulgence vacation experiences (e.g., fine dining, night life), and to a lesser extent, exploratory vacation experiences (e.g. visiting historical sites, natural sites, museums and art galleries) and opportunities to participate in a hobby or sport while on vacation. They were also very active in a wide variety of outdoor activities (especially sailing, windsurfing or scuba diving, jogging, and work outs at a fitness centre), suggesting that they are generally in excellent physical condition and interested in energetic, strenuous outdoor pursuits. Individuals who visit a health spa during the past two years while travelling were also frequent participants in a wide variety of cultural and entertainment pursuits, and in particular, high arts performances (e.g., ballet, live theatre, opera) and professional sporting events.

Those who visited a health spa during the past two years clearly exhibited a keen interest in unusual accommodation-related vacation experiences. For example, relative to the overall travel market, spa visitors were 151% more likely to have stayed at a bed and breakfast; 254% more likely to have stayed at a ski resort during the summer; 396% more likely to have stayed at a guest farm or working farm; 780% more likely to have stayed at a gourmet restaurant with accommodations; 1,133% more likely to have stayed at a cooking school; and 1,371% more likely to have stayed at a wine tasting school. They were also much more likely to have taken day and night tours while travelling, and exhibited considerable interest in a wide array of new tourism attractions. These relationships suggest that health spa visitors tend to seek novel and unusual vacation experiences. Consistent with this hypothesis, they were very active consumers of most print publications associated with travel and tourism, and frequently used the Internet as an information source to plan their trips.

Background

An association of Canadian tourism ministries and organizations have collaborated to conduct two large-scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities & Motivation Survey* (TAMS), represents the comprehensive assessment of travel behaviour and motivators, and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace, as well as the factors which motivate travel behaviour. The TAMS database consists of a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 to April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. Persons participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mailback questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these 11,892 (29.5%) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2%) returning the questionnaire while 6,405 (26.0%) of the U.S. respondents returned the questionnaire.

The current study examines interest in vacations at health spas. The database was used to identify sectors of the market that had stayed in a health spa during the past two years or expressed an interest in staying in a health spa over the course of the next two years. This report provides the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations and impressions of Canada and Ontario relative to the interest shown in health spas. This report also provides an overall market potential of each segment of the market to identify those segments that offer the best potential for marketing, advertising and promotional activities designed to promote Canada's and Ontario's health spas.

Health Spa Interest Index:
Construction of the Index

The TAMS mailback survey contained two items specifically associated with stays at a health spa:

- Whether the respondent had stayed at a health spa during the past two years
- Whether the respondent was likely to stay at a health spa during the next two years

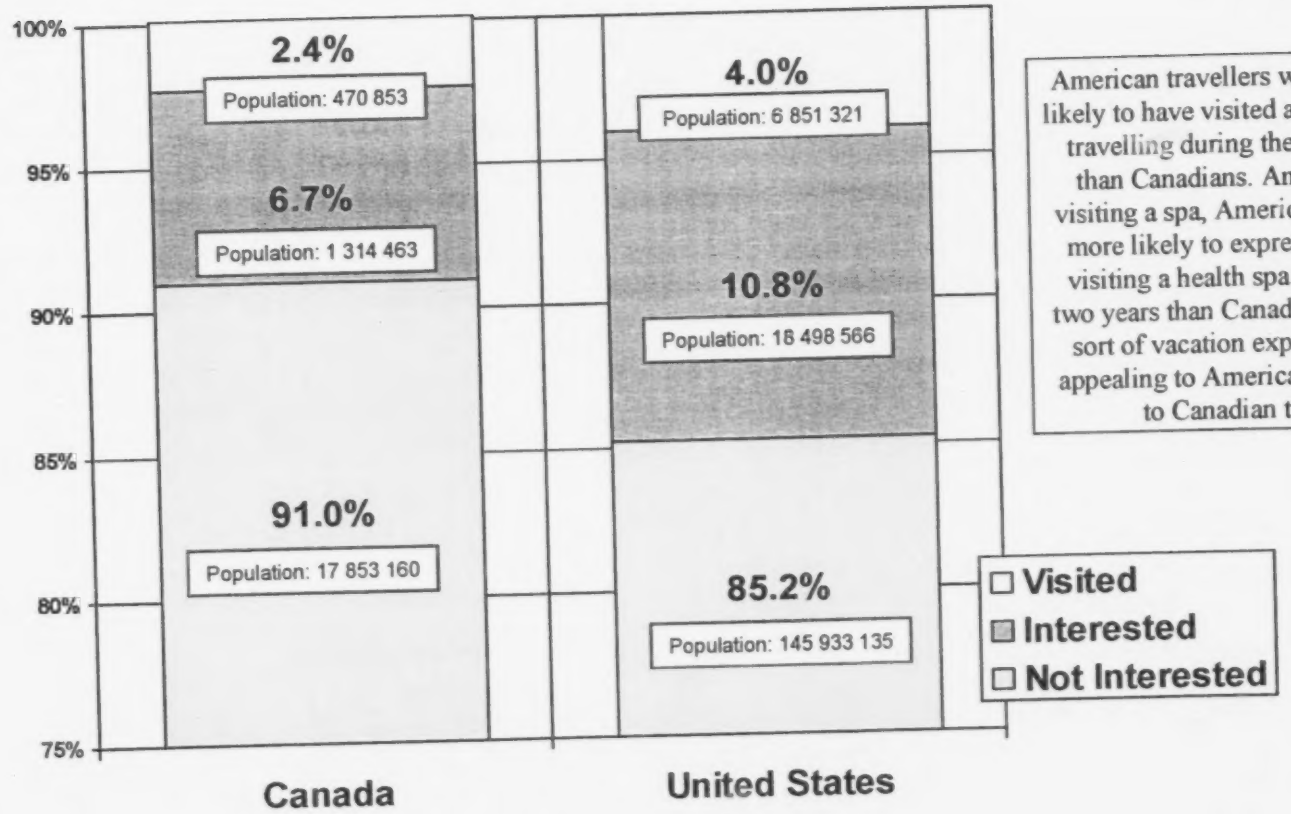
Based on the responses to these two questions the TAMS respondents were classified into three groups:

- Not Interested: Has neither stayed at a health spa during the last two years nor plans to stay at a health spa over the course of the next two years
- Interested: Has not stayed at a health spa during the last two years, but plans to stay at a health spa over the course of the next two years
- Visited: Has stayed at a health spa during the last two years (regardless of their interest in staying in a health spa during the next two years)

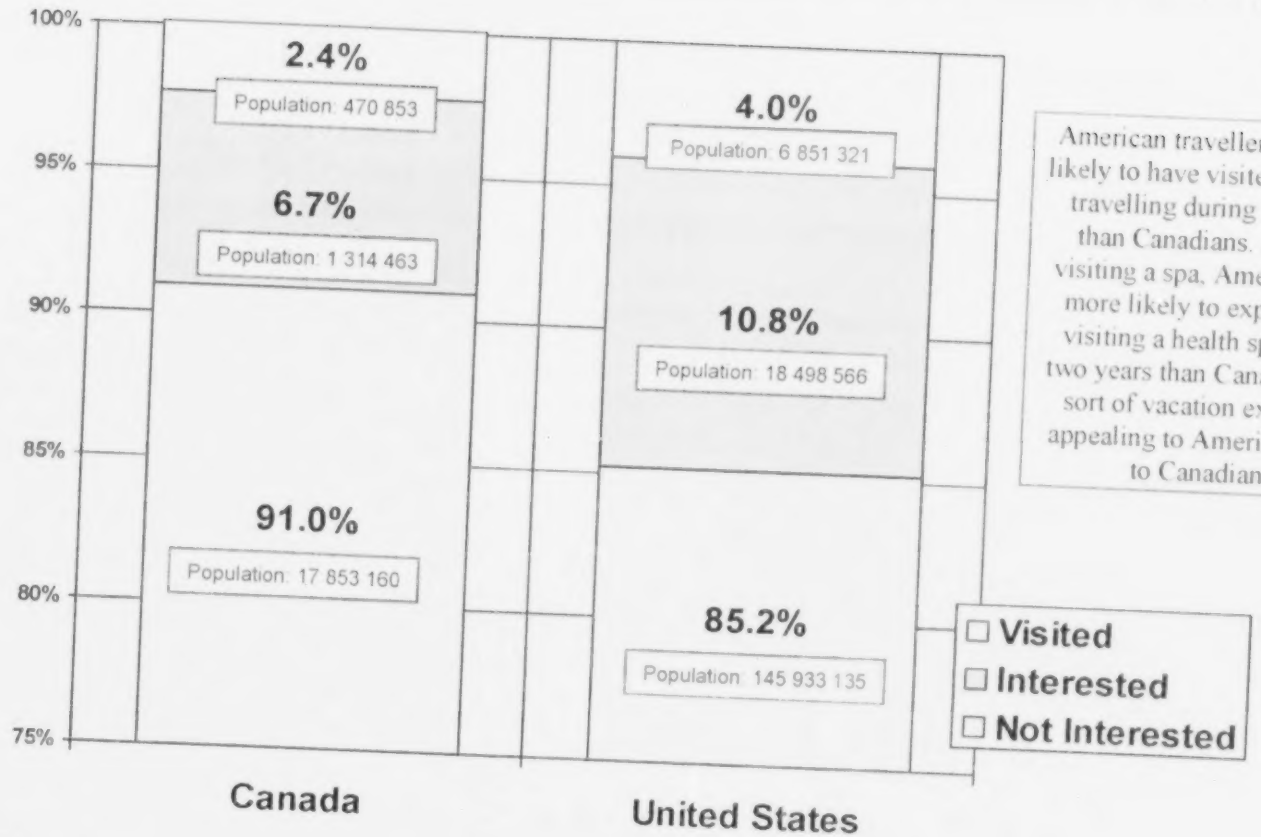
Interest in Health Spas

Canada versus United States

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



American travellers were 66.7% more likely to have visited a health spa while travelling during the past two years than Canadians. Among those not visiting a spa, Americans were 61.2% more likely to express an interest in visiting a health spa during the next two years than Canadians. Clearly this sort of vacation experience is more appealing to American travellers than to Canadian travellers.



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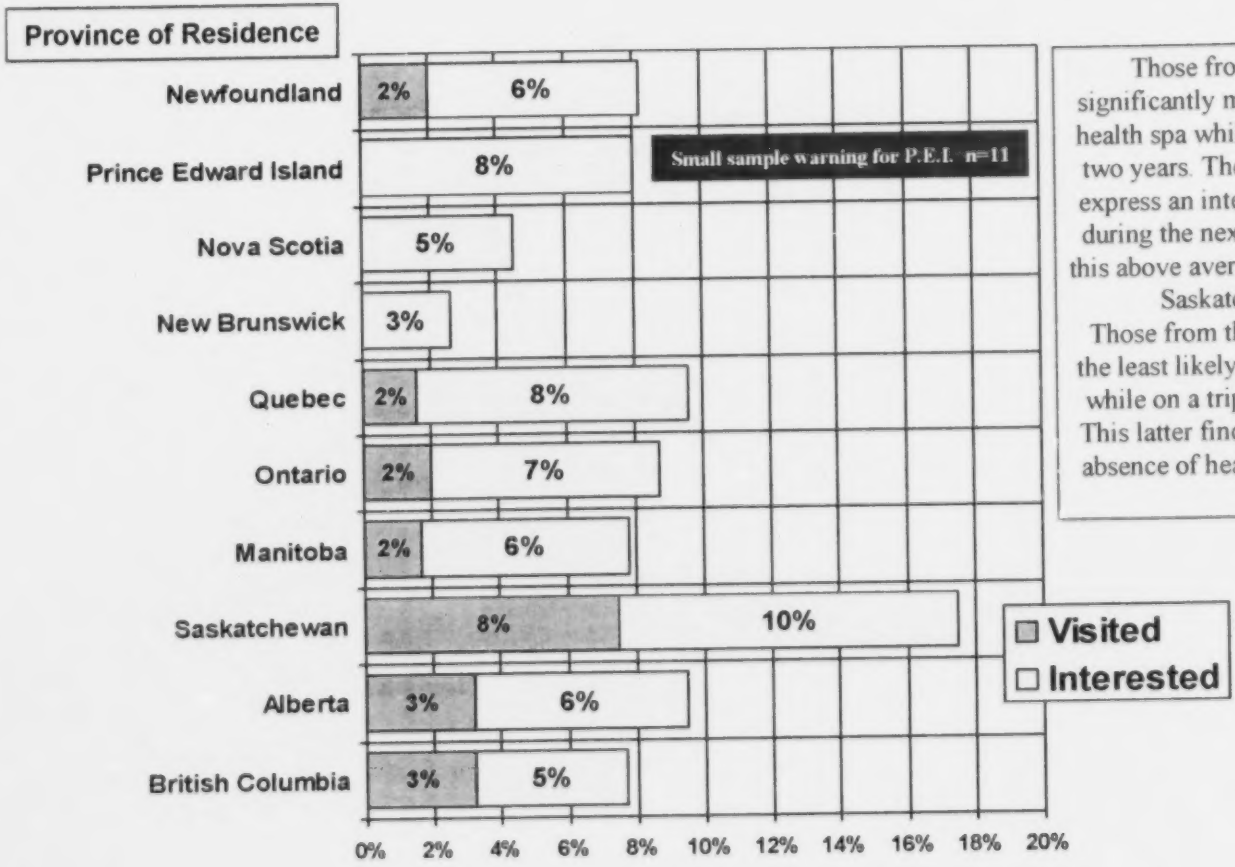
Interest in Health Spas
Canada: By Province

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years

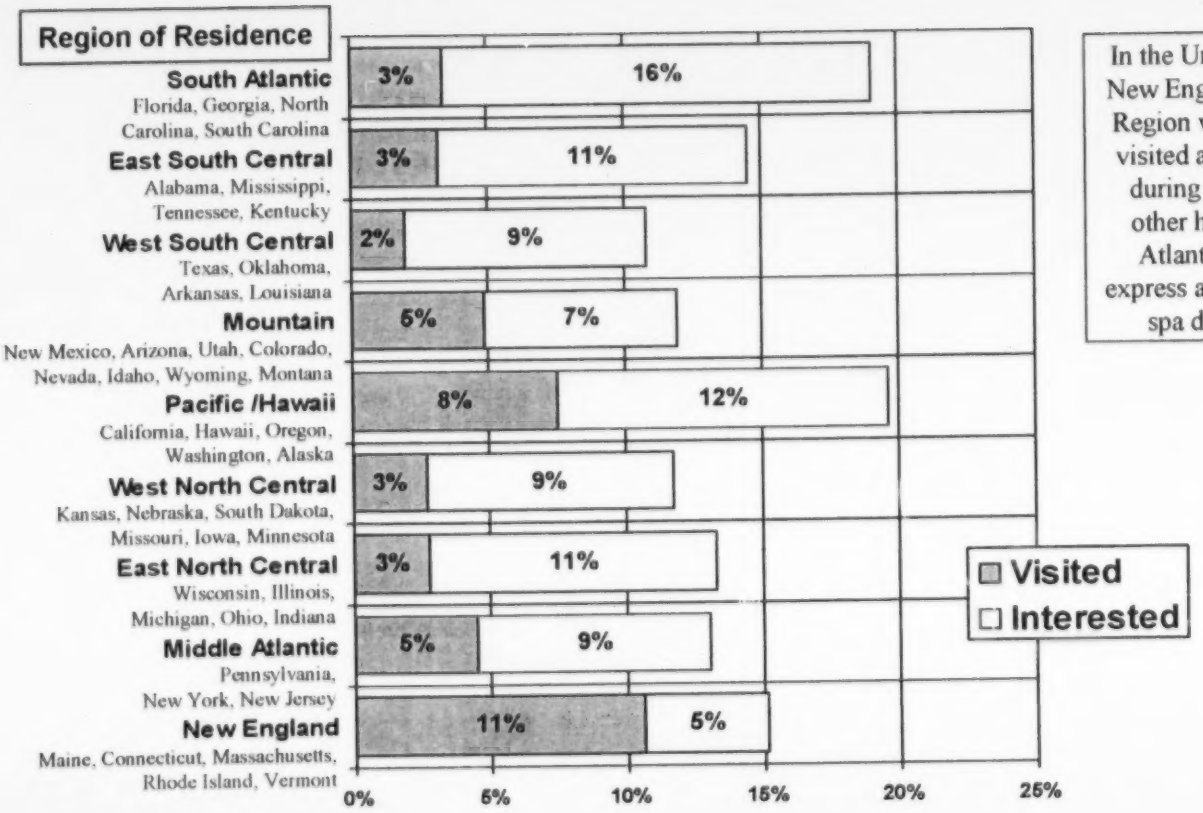


Those from Saskatchewan were significantly more likely to have visited a health spa while travelling during the past two years. They were also more likely to express an interest in visiting a health spa during the next two years. The reason for this above average interest in health spas in Saskatchewan is not know.

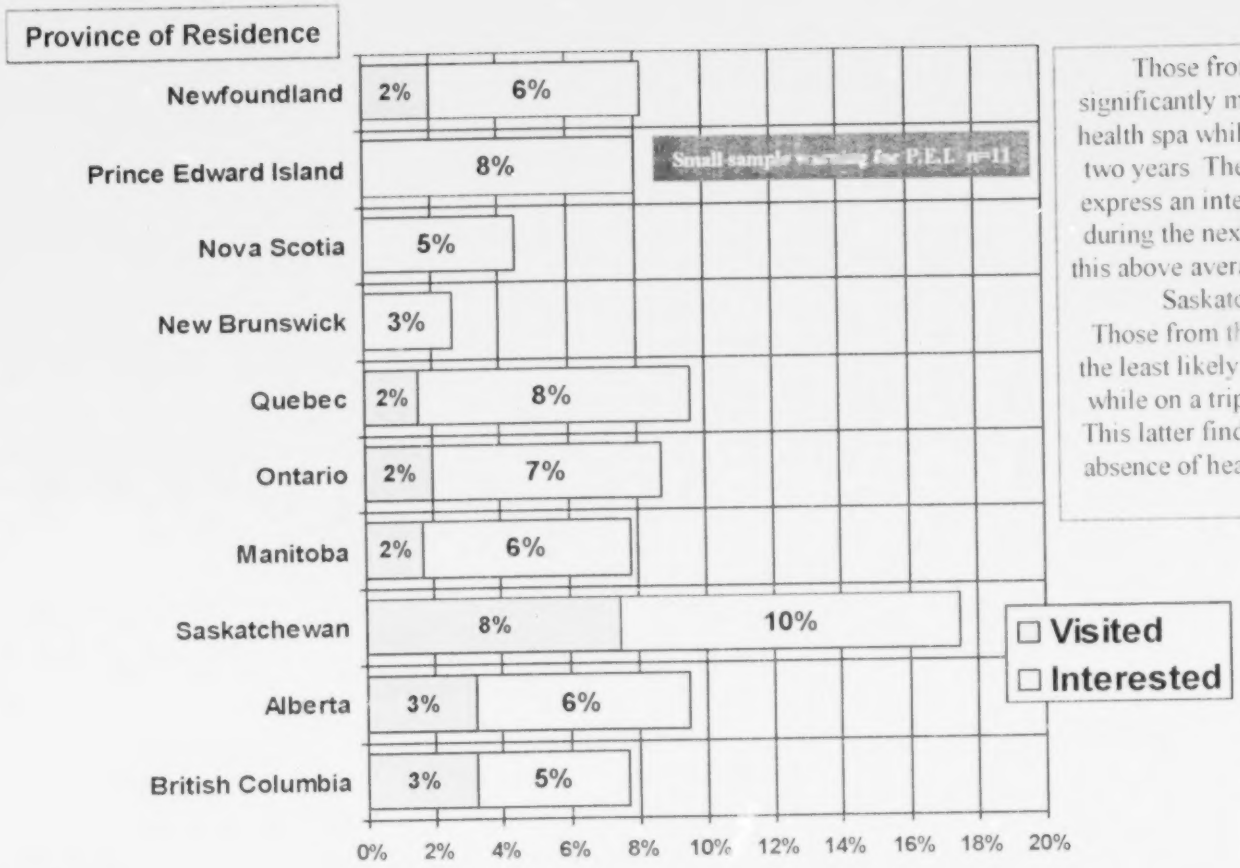
Those from the Atlantic Provinces were the least likely to have visited a health spa while on a trip during the past two years. This latter finding may reflect the relative absence of health spas within the Atlantic Region.

Interest in Health Spas
United States: By Region

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



In the United States, the residents of New England and the Pacific/Hawaii Region were the most likely to have visited a health spa while travelling during the past two years. On the other hand, those from the South Atlantic were the most likely to express an interest in visiting a health spa during the next two years.



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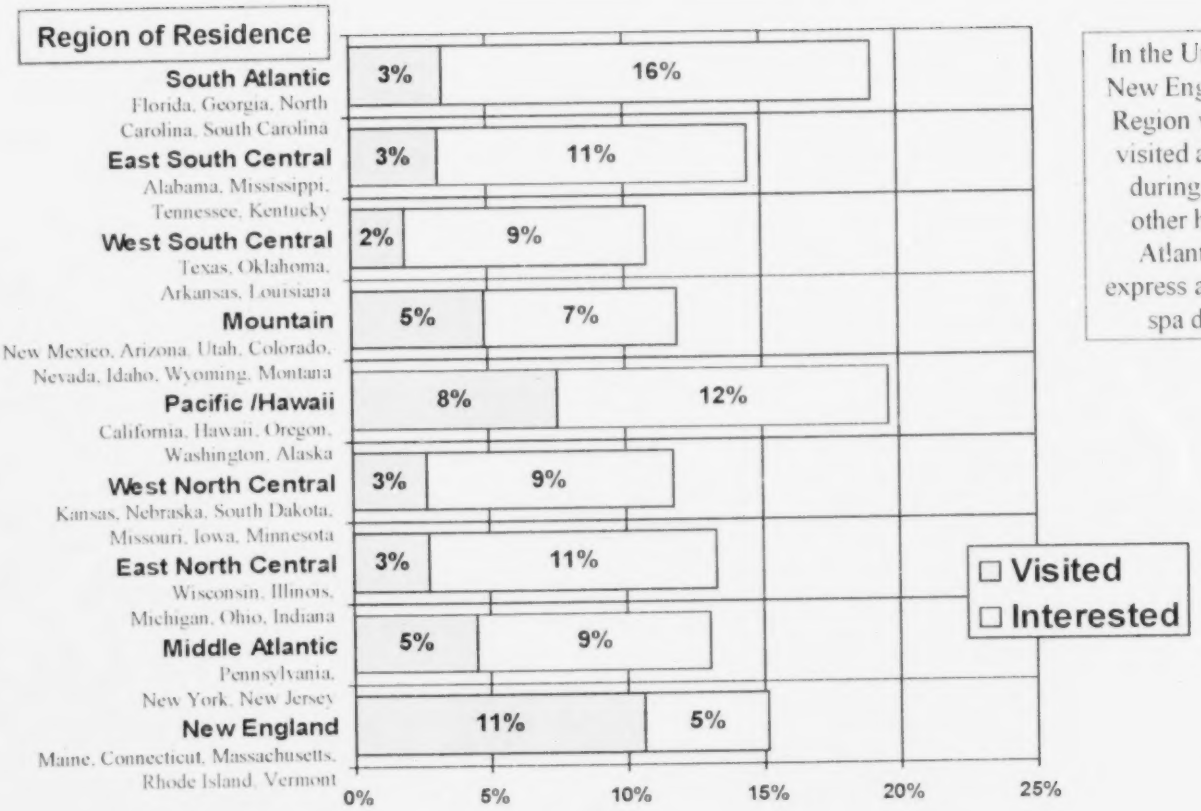

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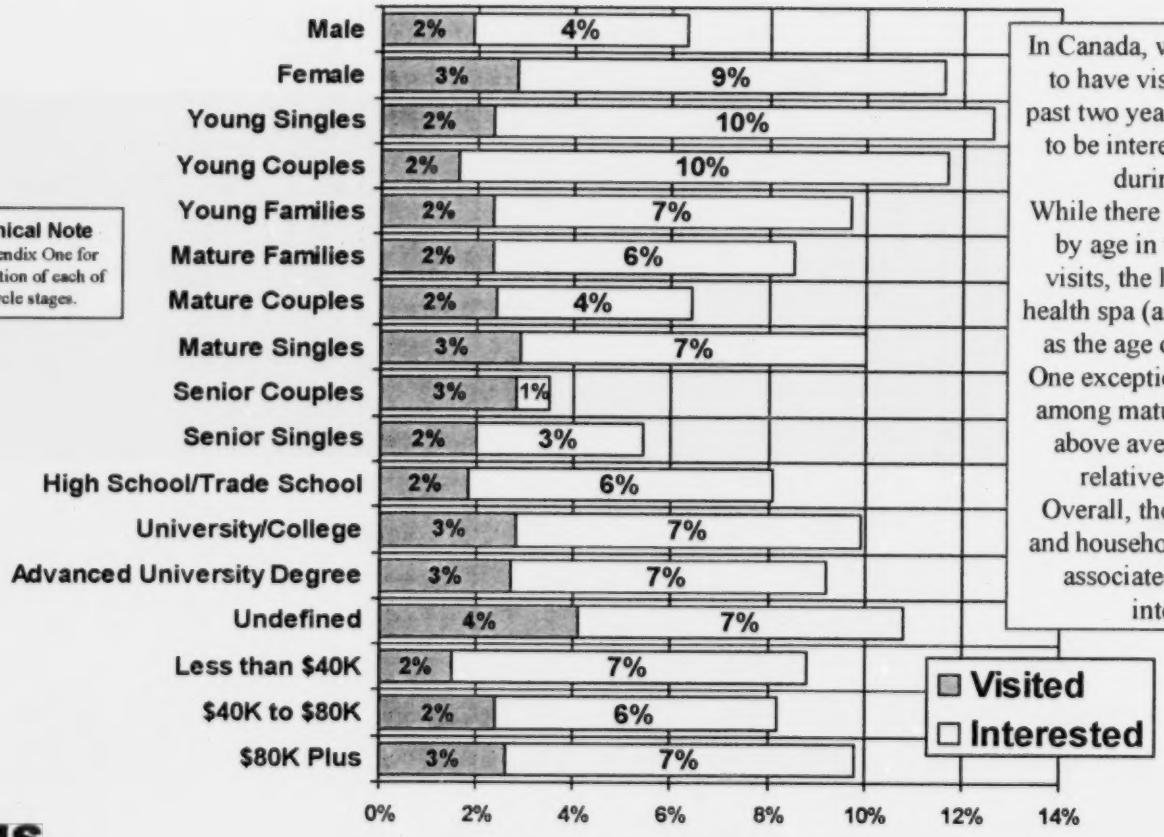
Interest in Health Spas
By Demographics: Canada

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years

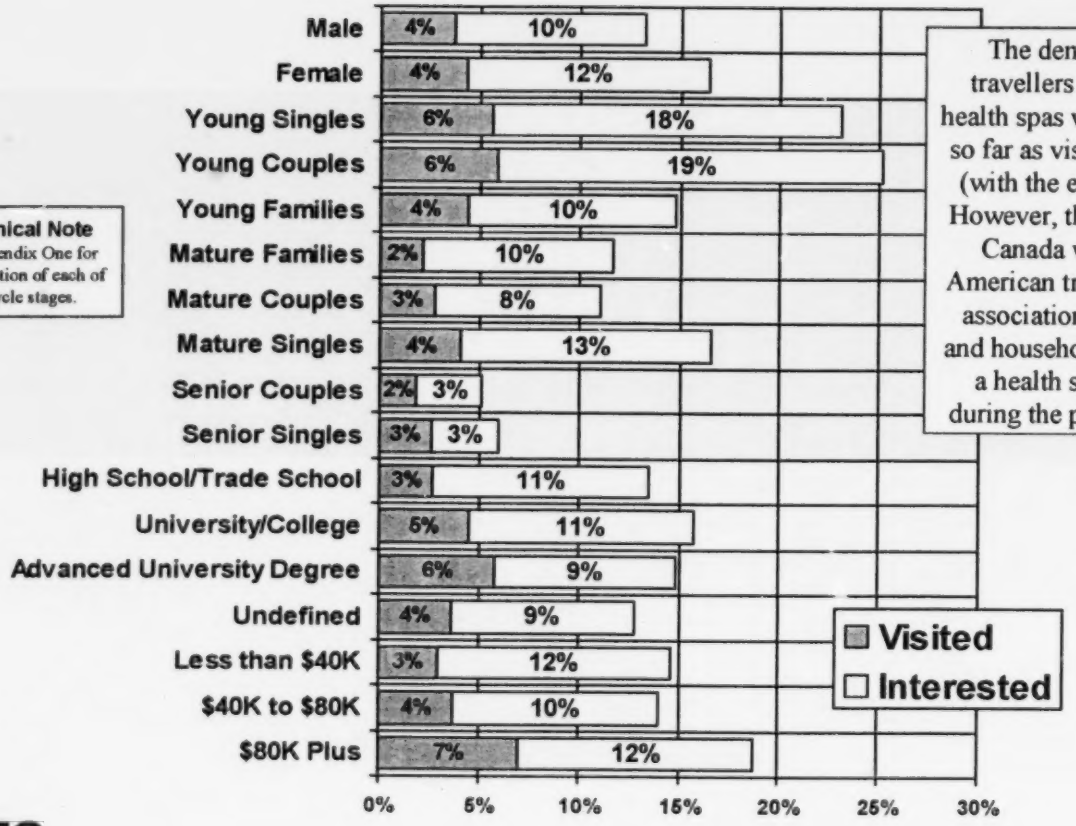


Technical Note
See Appendix One for a description of each of the lifecycle stages.

In Canada, women were 47% more likely to have visited a health spa during the past two years, and twice as likely as men to be interested in visiting a health spa during the next two years.
While there was relatively little variation by age in the incidence of health spa visits, the level of interest in visiting a health spa (among non-visitors) decreased as the age of the respondent increased.
One exception to this trend was observed among mature singles who exhibited an above average interest in health spas relative to their same age peers.
Overall, the levels of formal education and household income were only weakly associated with health spa visits or interest in health spas.

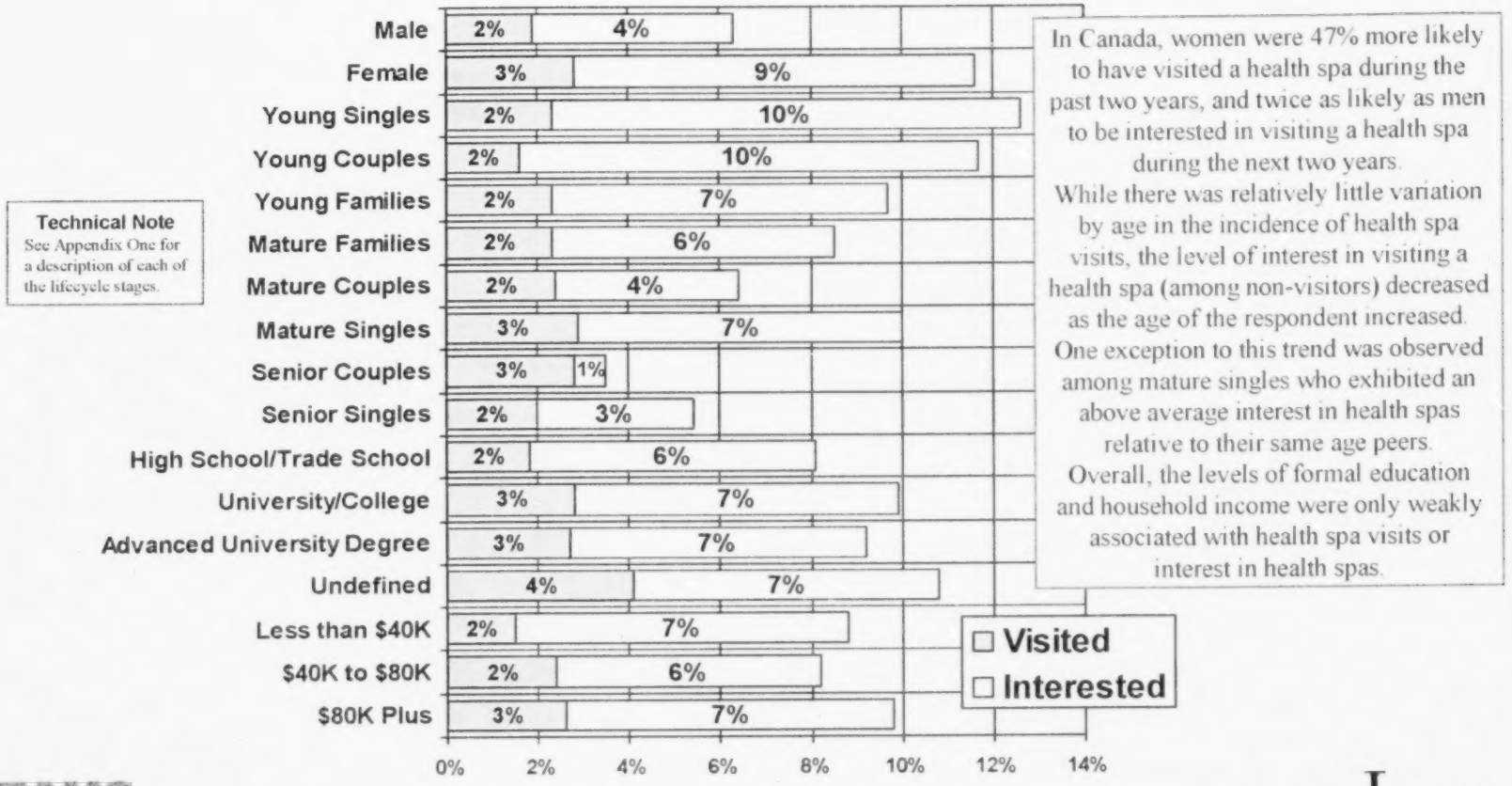
Interest in Health Spas
By Demographics: United States

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



Technical Note
See Appendix One for a description of each of the lifecycle stages.

The demographic profile of American travellers visiting or interested in visiting health spas was similar to that of Canadians in so far as visits and interest declined with age (with the exception of the Mature Singles). However, the gender differences observed in Canada were much less evident among American travellers, and there was a stronger association between the level of education and household income and the likelihood that a health spa was visited while travelling during the past two years among Americans.



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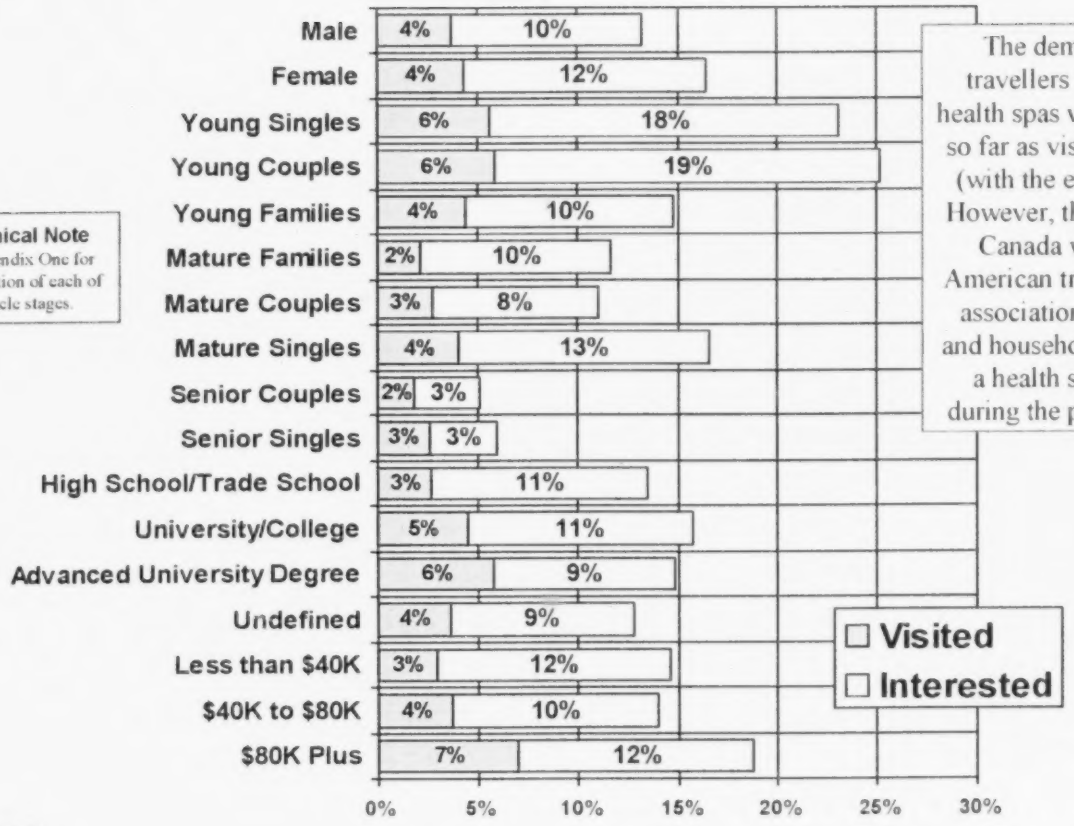
Overall, the levels of formal education and household income were only weakly associated with health spa visits or interest in health spas.



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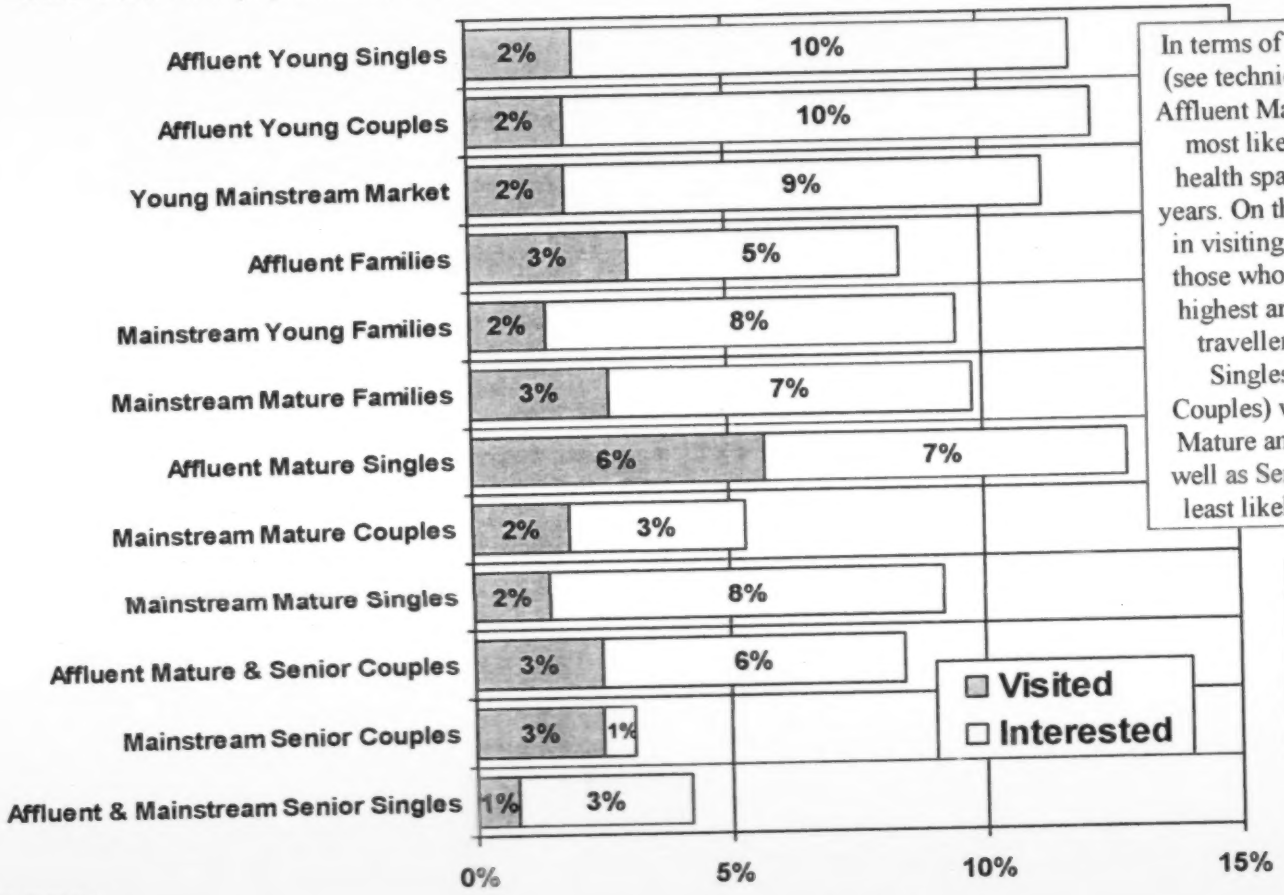
Interest in Health Spas
By Market Segment: Canada

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years

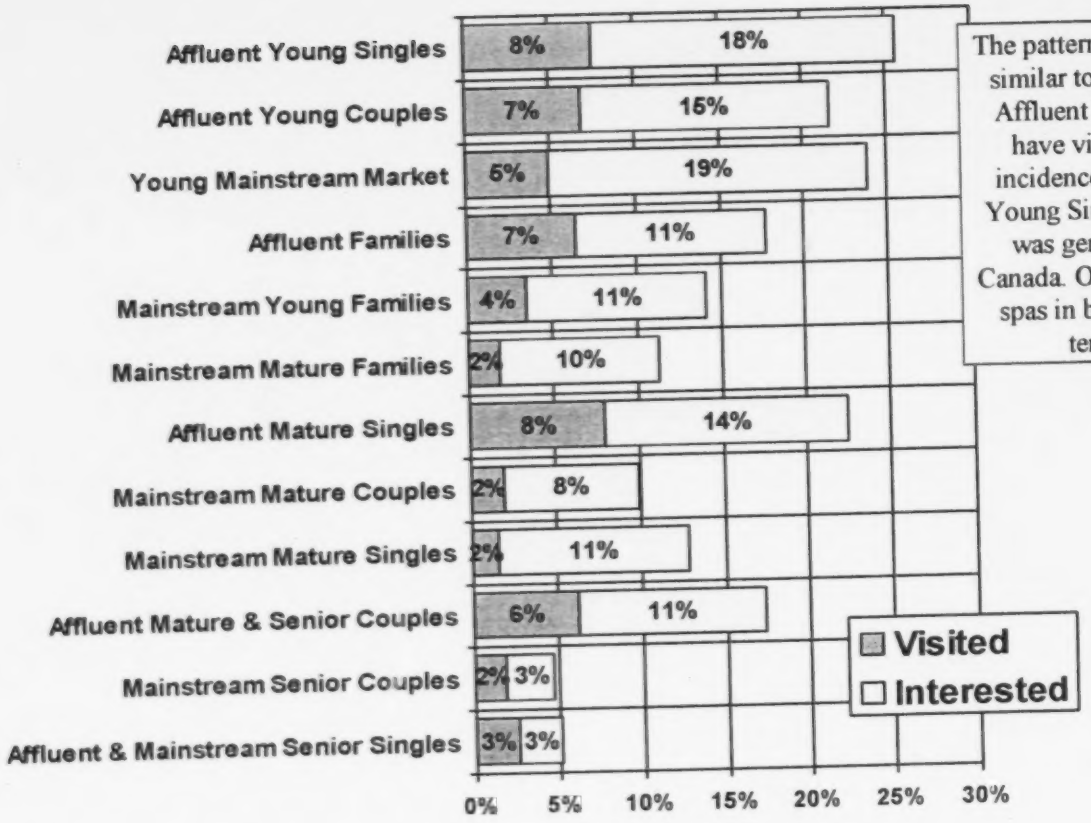


In terms of the market segments (see technical notes) in Canada, Affluent Mature Singles were the most likely to have visited a health spa during the past two years. On the other hand, interest in visiting a health spa (among those who had not visited) was highest among young affluent travellers (Affluent Young Singles, Affluent Young Couples) while the Mainstream Mature and Senior Couples, as well as Senior Singles, were the least likely to exhibit interest.

Technical Note
The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

Interest in Health Spas
By Market Segment: United States

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



The pattern observed in the United States was similar to that observed in Canada with the Affluent Mature Singles the most likely to have visited a health spa. However, the incidence of spa visits among the Affluent Young Singles and Affluent Young Couples was generally higher in the U.S. than in Canada. Overall, the prime markets for health spas in both Canada and the United States tend to be affluent and single.

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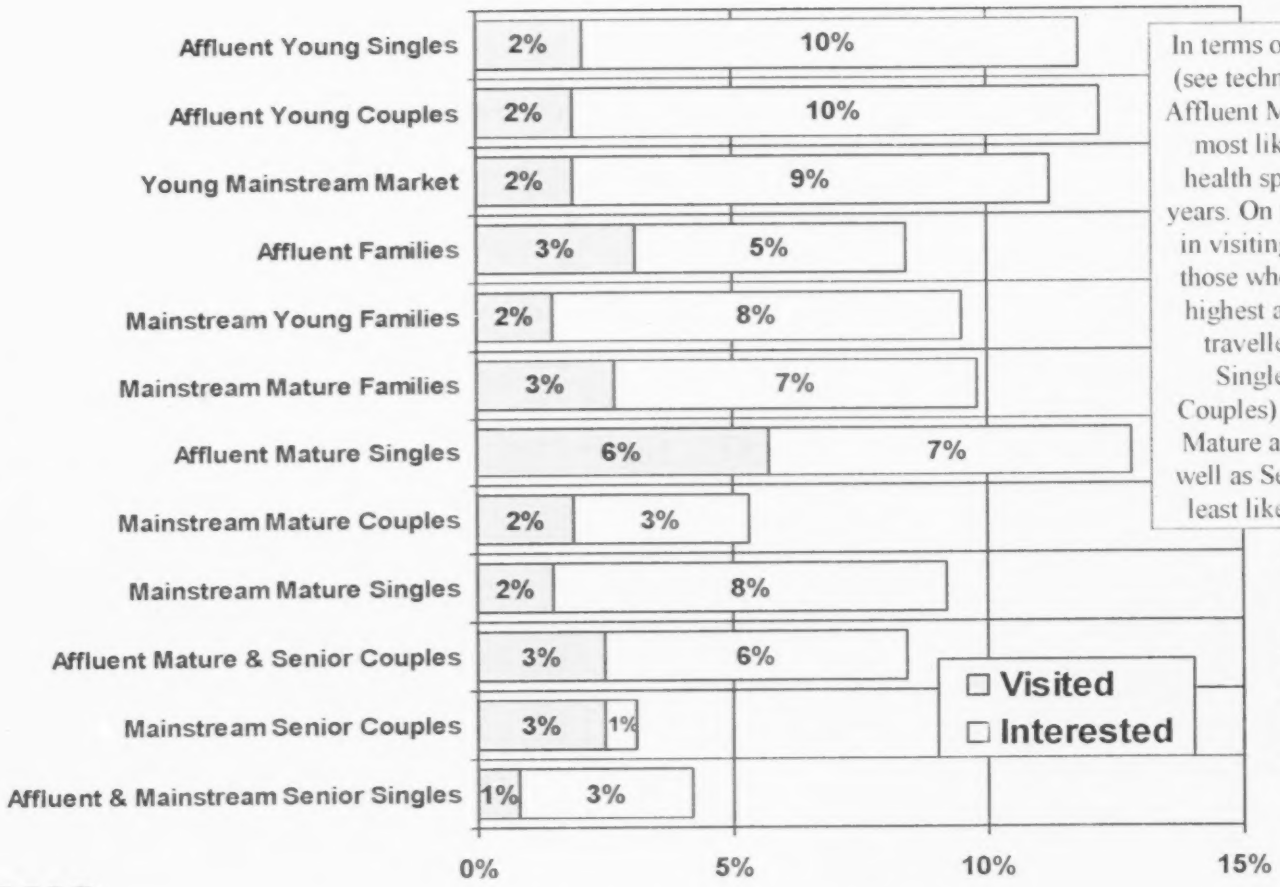

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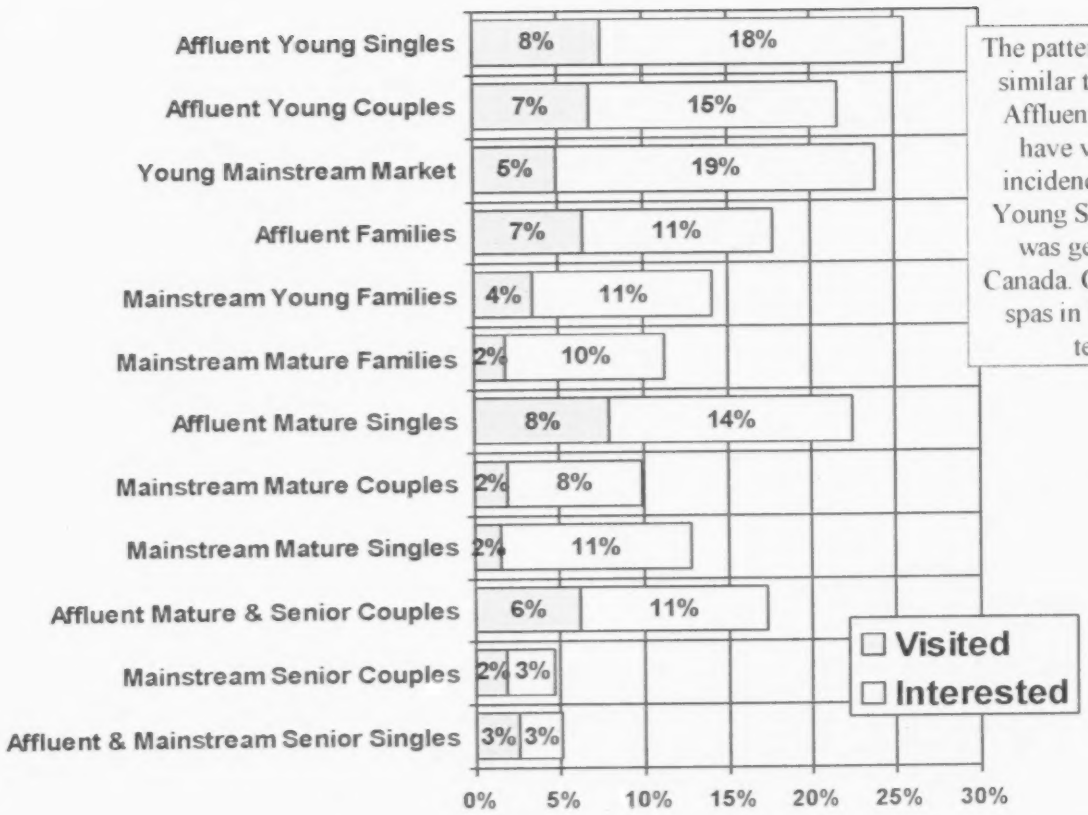

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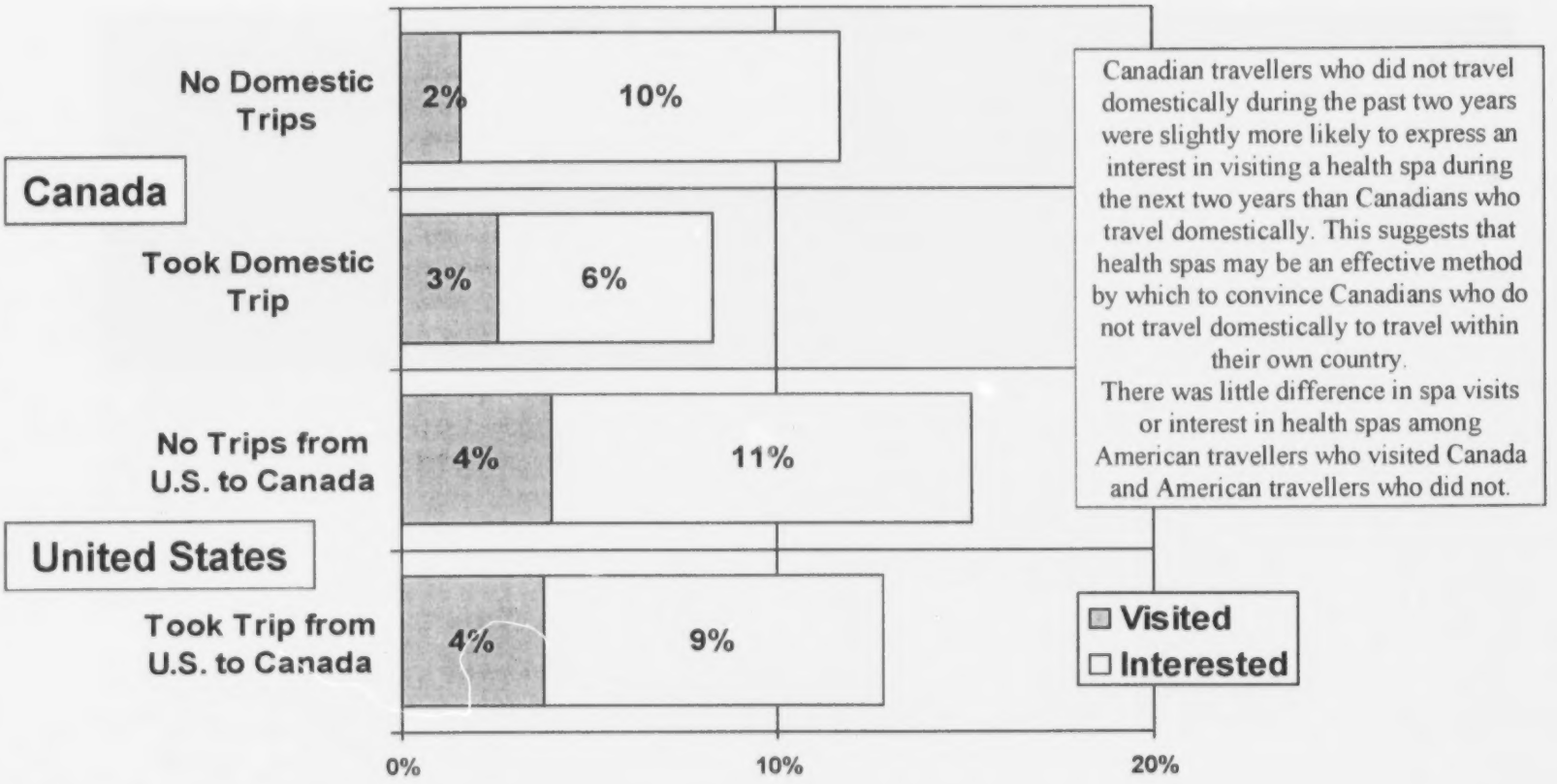
Technical Note

The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

Interest in Health Spas
By Trips in Canada in Last Two Years: Canada versus United States

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years

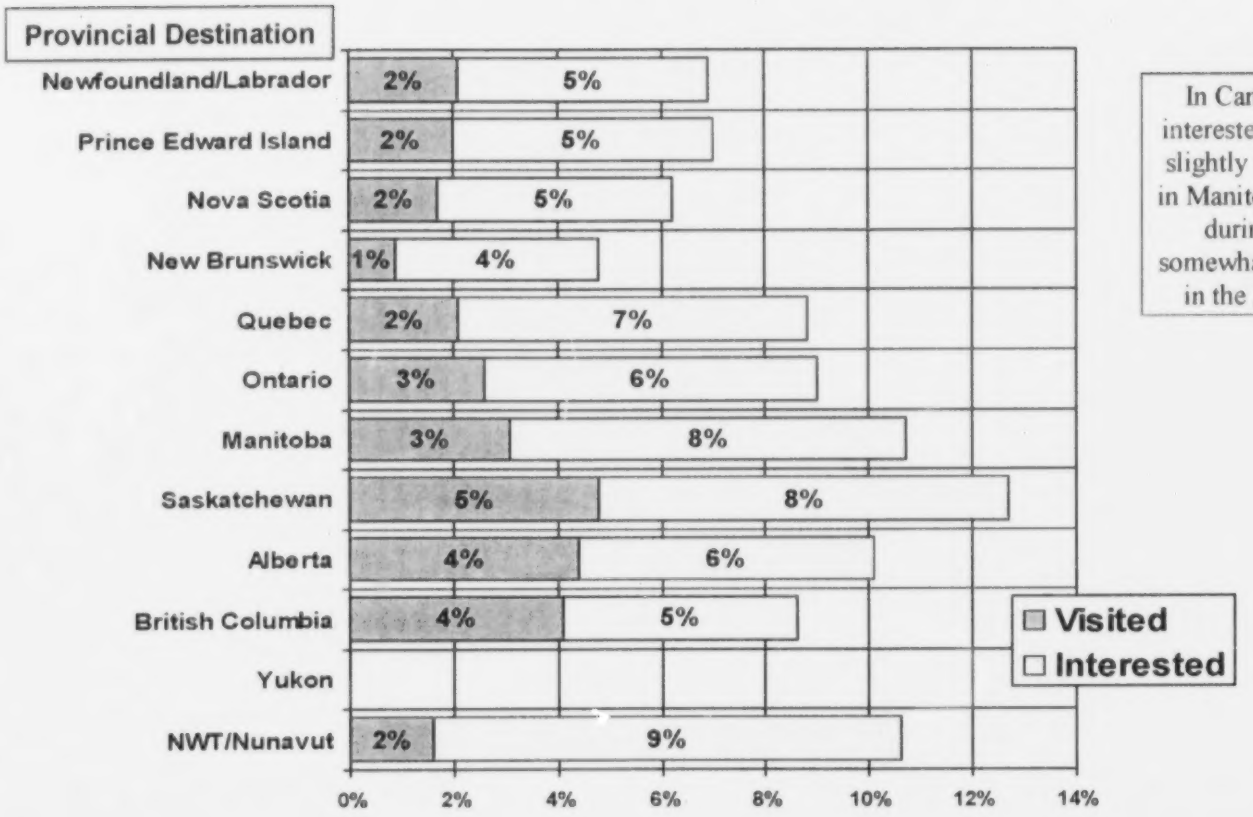


Canadian travellers who did not travel domestically during the past two years were slightly more likely to express an interest in visiting a health spa during the next two years than Canadians who travel domestically. This suggests that health spas may be an effective method by which to convince Canadians who do not travel domestically to travel within their own country.

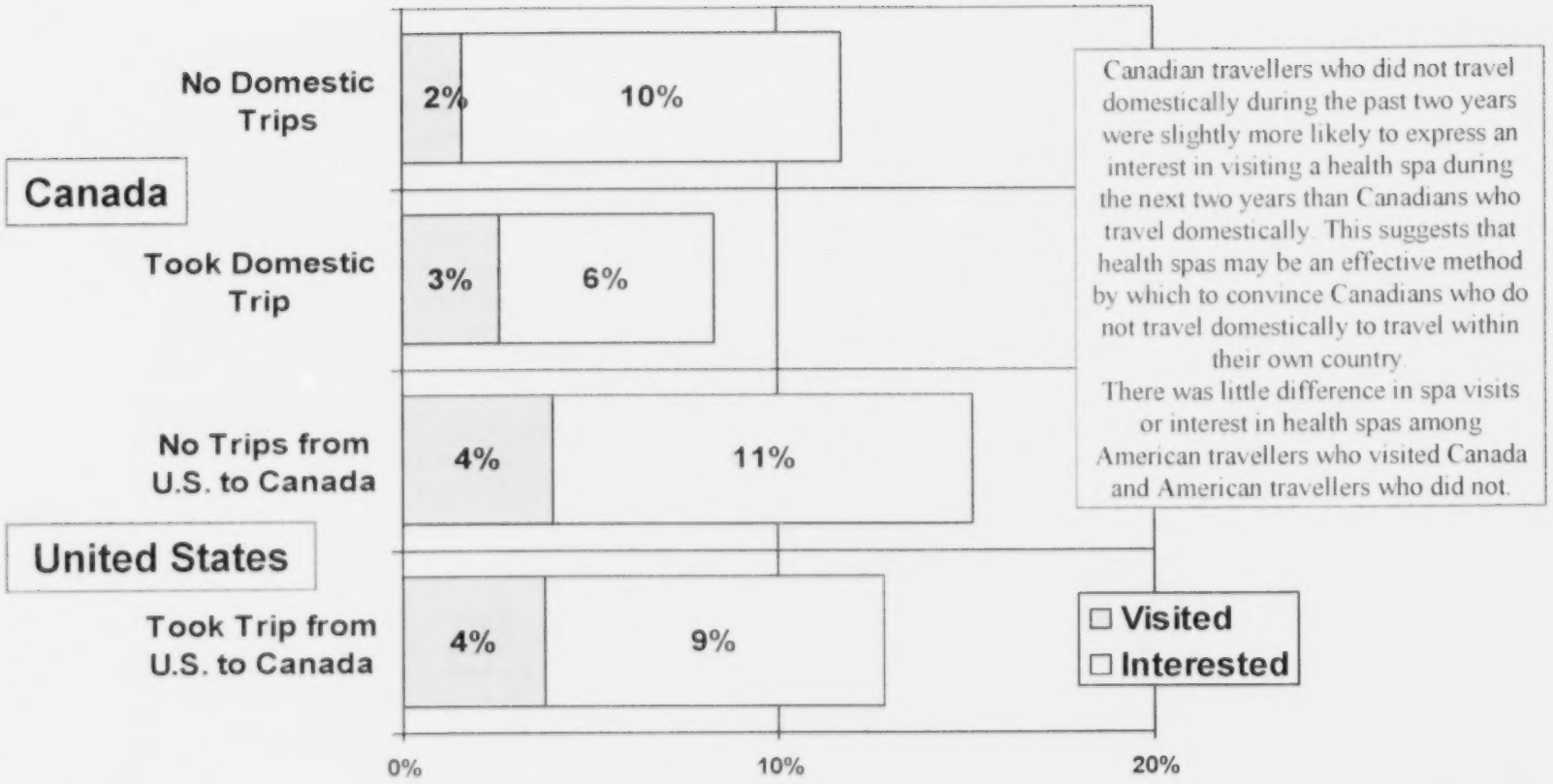
There was little difference in spa visits or interest in health spas among American travellers who visited Canada and American travellers who did not.

Interest in Health Spas
Interest By Province Travelled To: Canada

Base: Percent of population (18 plus) who travelled to a province during the last two years



In Canada, individuals visiting or interested in visiting health spas were slightly more likely to have travelled in Manitoba, Saskatchewan or Alberta during the past two years, and somewhat less likely to have travelled in the Atlantic Region of Canada.


No Domestic Trips
2%
10%
Canada
Took Domestic Trip
3%
6%
No Trips from U.S. to Canada
4%
11%
United States
Took Trip from U.S. to Canada
4%
9%
0%
10%
20%
Visited
Interested
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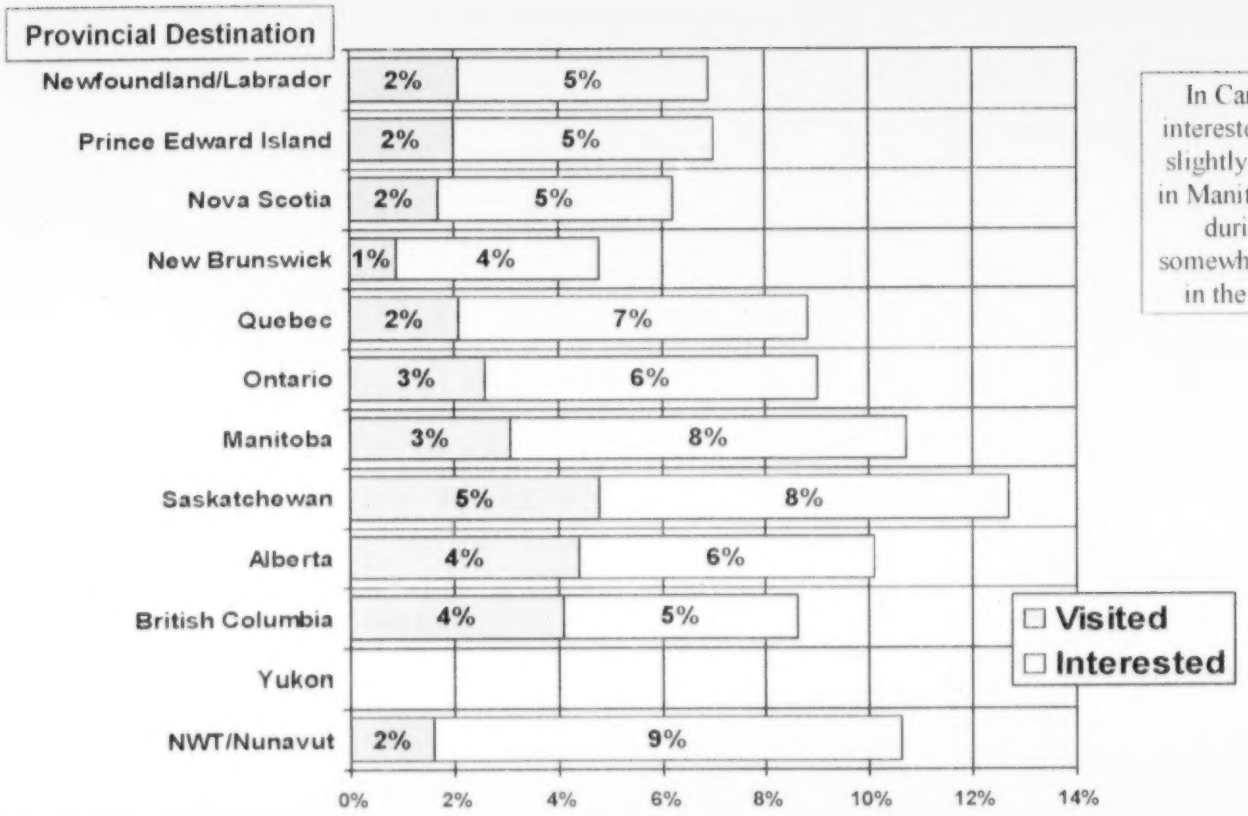

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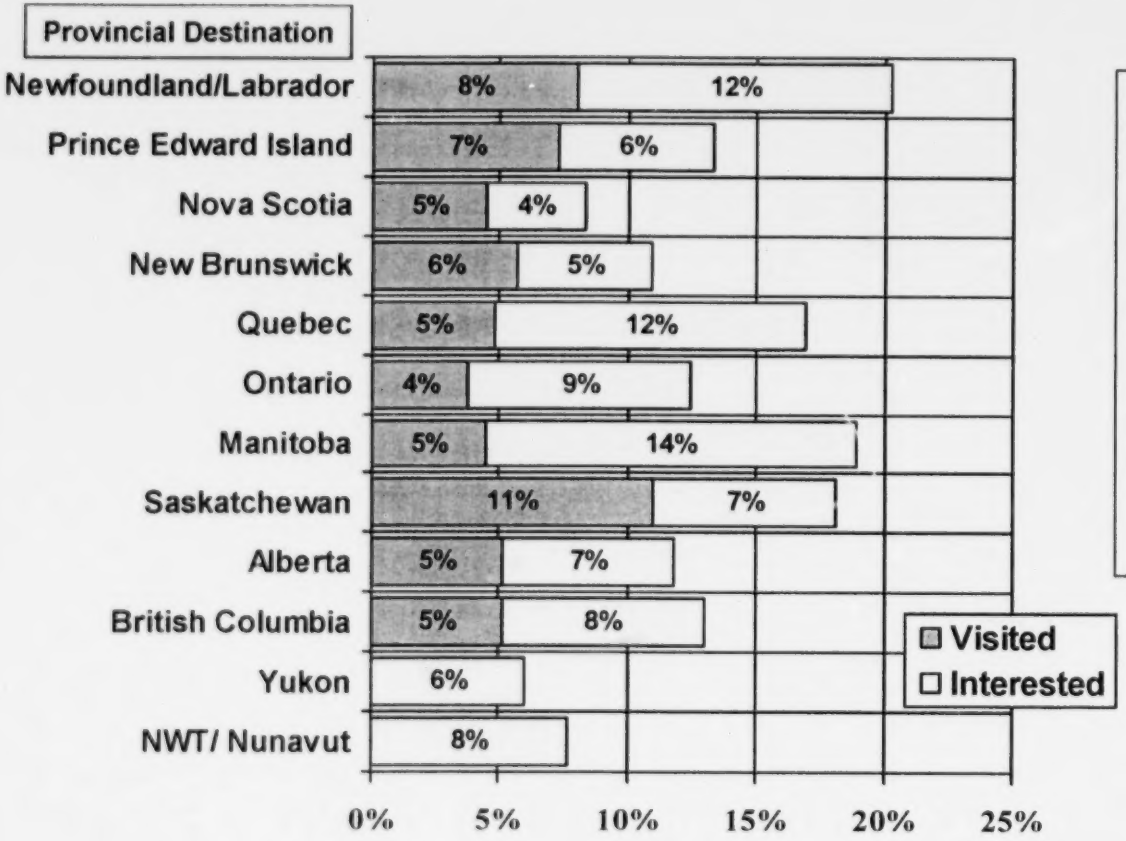
Interest in Health Spas
Interest By Province Travelled To: United States

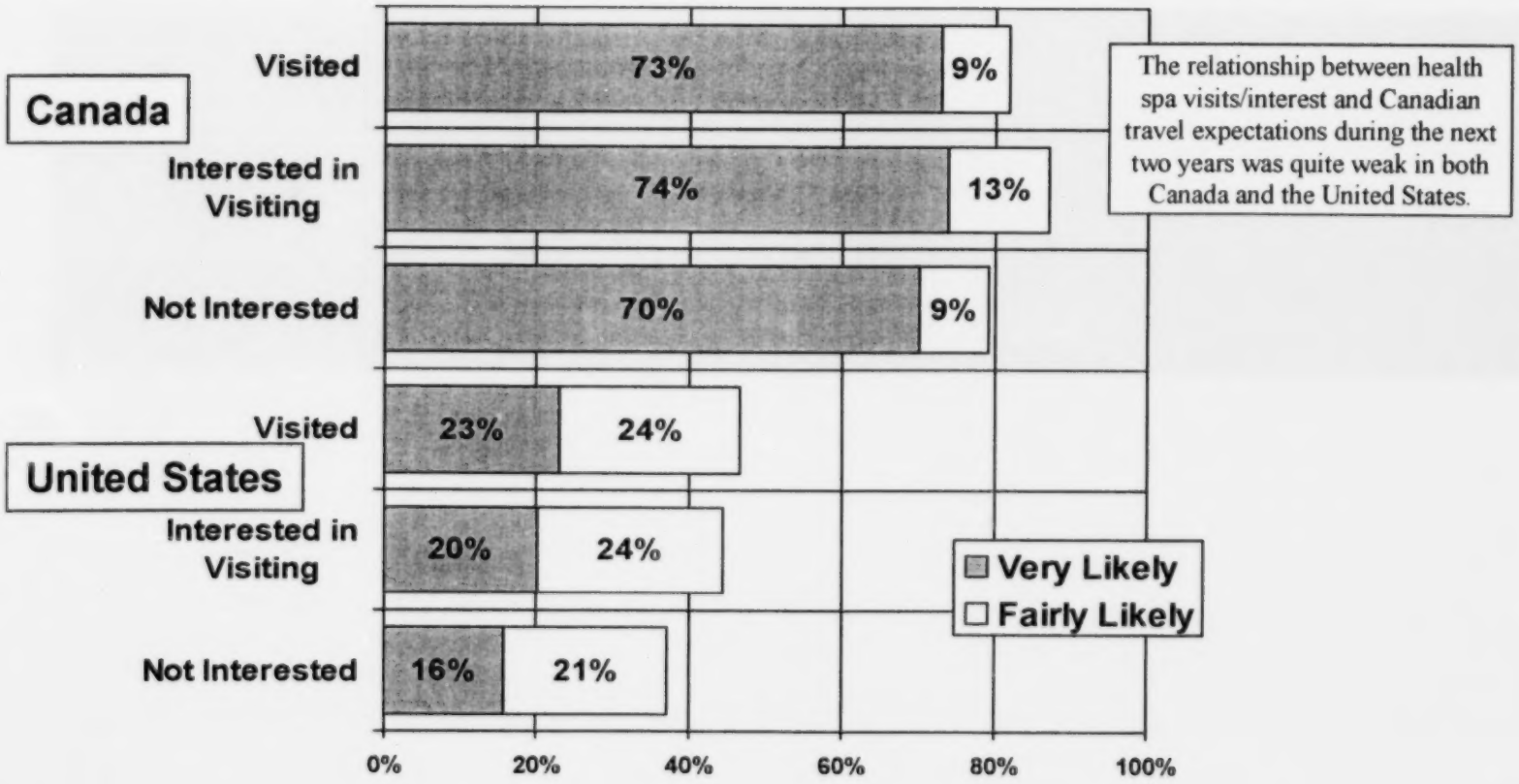
Base: Percent of population (18 plus) who travelled to a province during the last two years

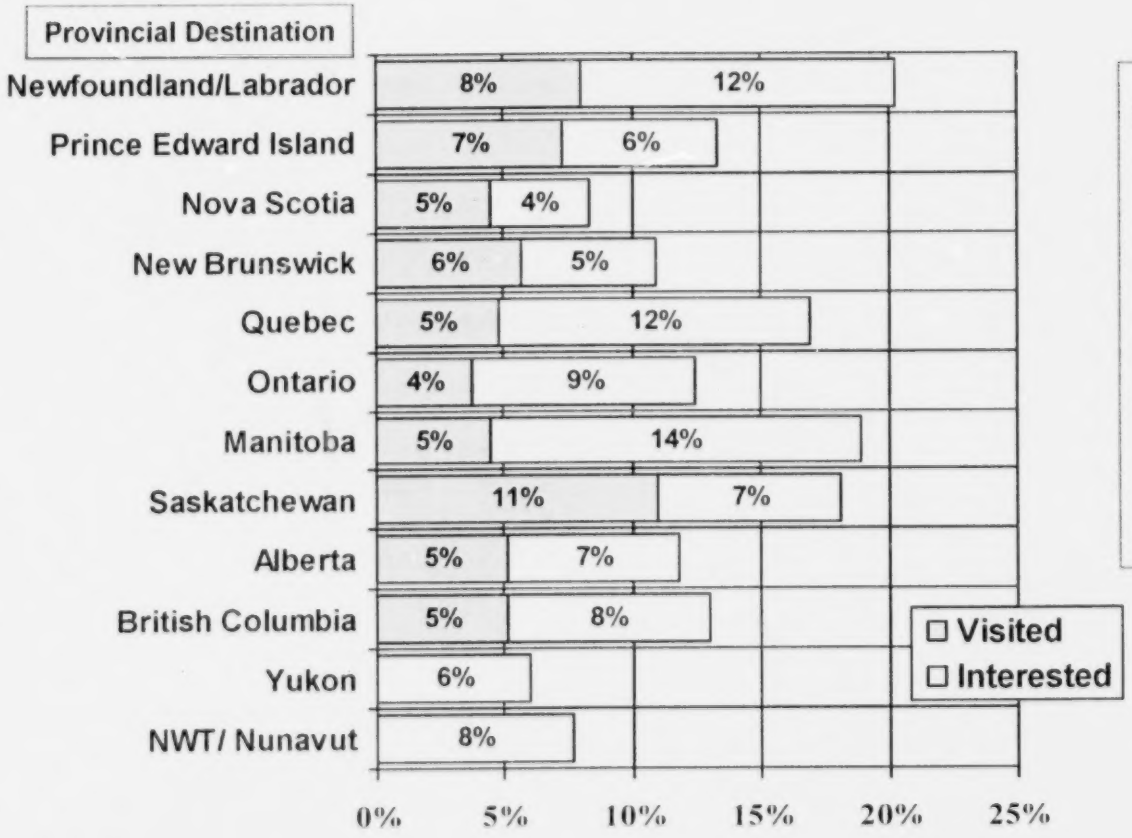


Americans who had visited Saskatchewan during the past two years were more likely to have visited a health spa than those visiting other provinces. This pattern is consistent with the high incidence of spa visits manifested by Saskatchewan residents during the past two years. American visitors to Newfoundland/Labrador, Quebec and Manitoba were the most likely to exhibit an interest in visiting a health spa during the next two years. This suggests that these provinces might benefit most by promoting their spas.

Interest in Health Spas
Intentions to Travel in Canada in Next Two Years

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years





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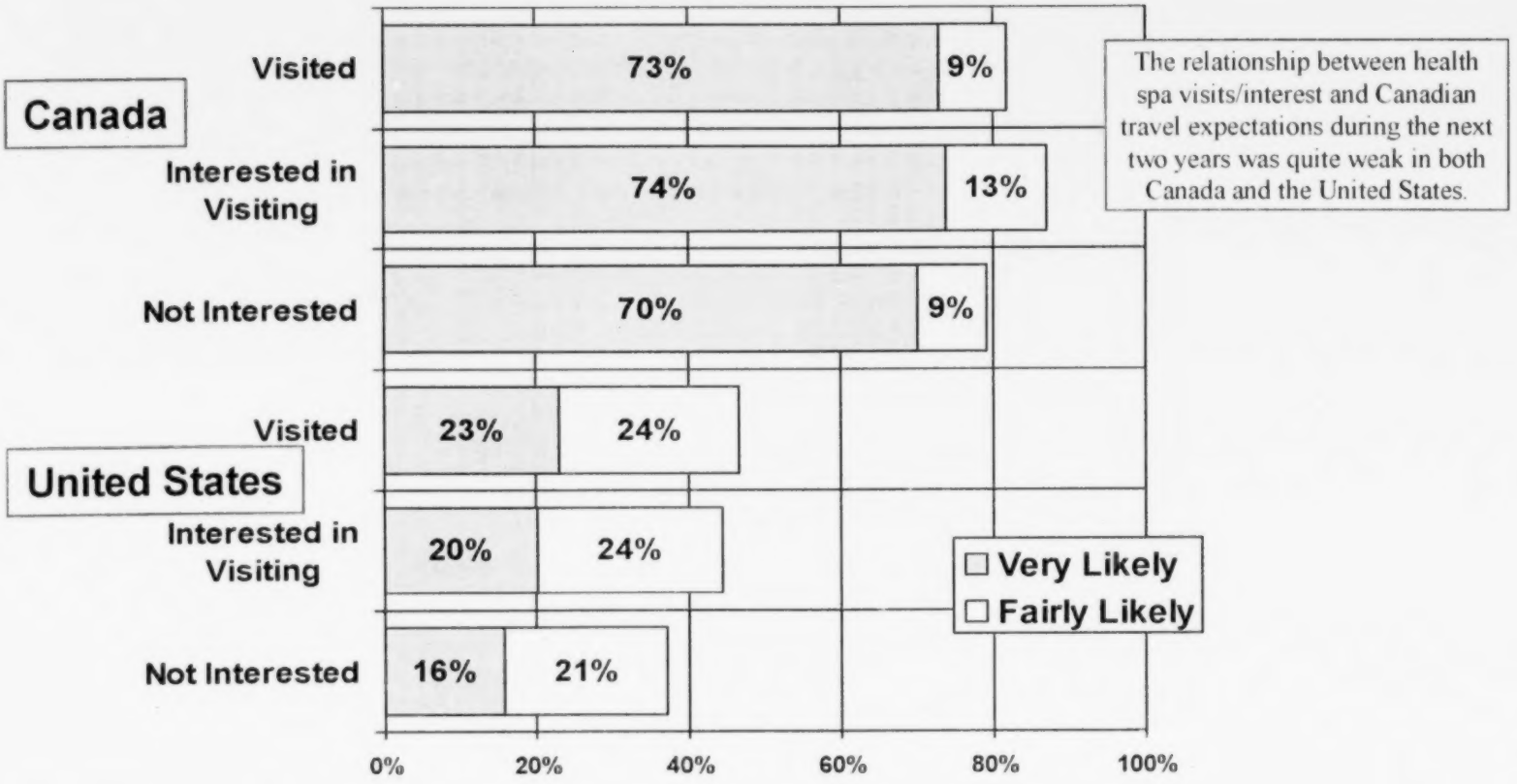
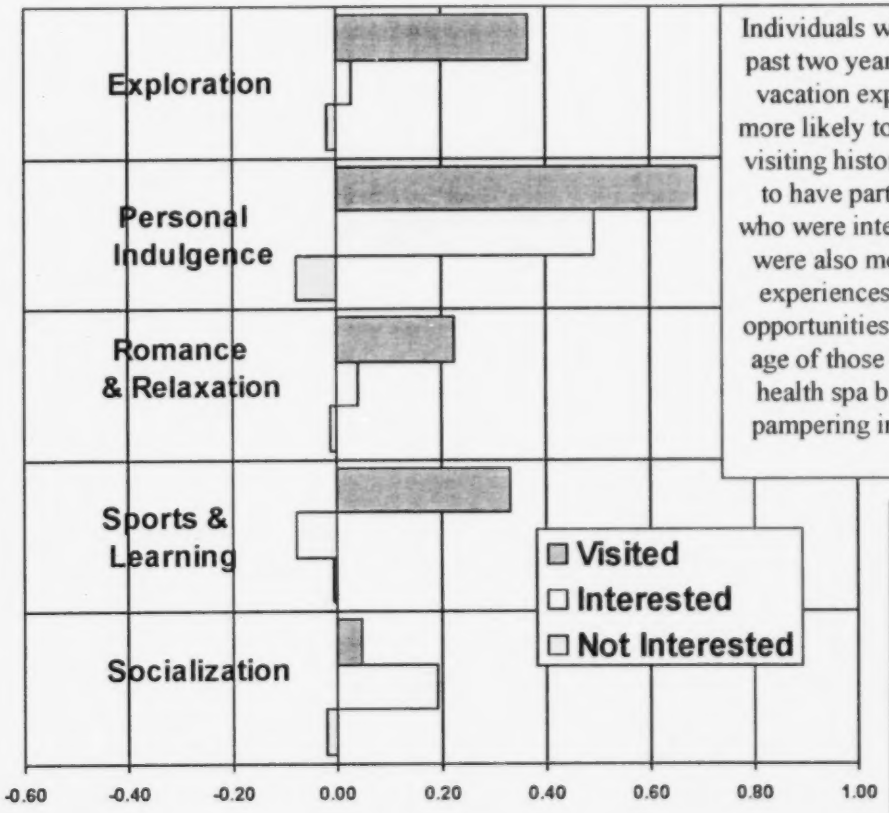

Canada
Visited
73%
9%
Interested in Visiting
74%
13%
Not Interested
70%
9%
United States
Visited
23%
24%
Interested in Visiting
20%
24%
Not Interested
16%
21%
Very Likely
Fairly Likely
0%
20%
40%
60%
80%
100%
The relationship between health spa visits/interest and Canadian travel expectations during the next two years was quite weak in both Canada and the United States.

Interest in Health Spas

General Vacation Experiences Sought during Pleasure Travel in the Past Two Years

Base: Total population (18 plus) who travelled in last two years, Canada & U.S. (mailback survey)



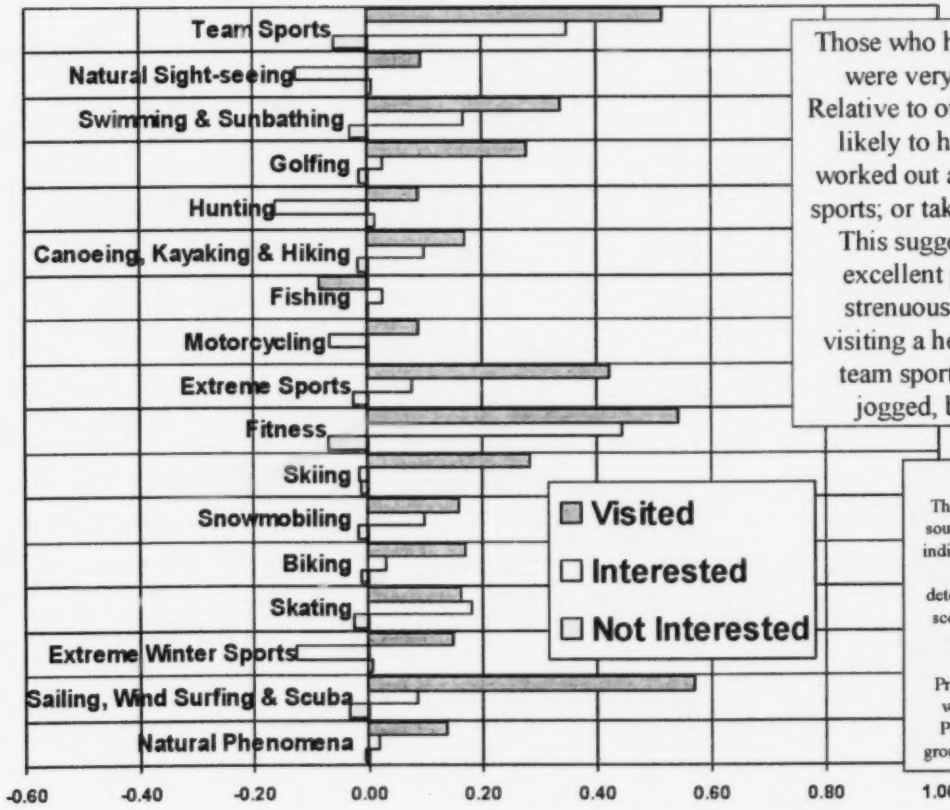
Individuals who have visited a health spa while travelling during the past two years were more likely to have sought personal indulgence vacation experiences (e.g., fine dining, night life). They were also more likely to have sought out exploration vacation experiences (e.g. visiting historical sites, natural sites, museums and art galleries) and to have participated in a hobby or sport while on vacation. Those who were interested in visiting a health spa during the next two years were also more likely to have sought personal indulgence vacation experiences during the past two years. This group also sought out opportunities to socialize with family and friends (a reflection of the age of those with an interest to visit health spas). The promotion of health spa based vacations should emphasize the opportunities for pampering in combination with opportunities to experience culture and entertainment.

Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Interest in Health Spas
Outdoor Activities Sought during Pleasure Travel in Past Two Years

Base: Total population (18 plus) who travelled in last two years, Canada & U.S. (mailback survey)



Those who had visited a health spa during the past two years were very active in a wide variety of outdoor activities. Relative to other travellers, health spa visitors were especially likely to have gone sailing, windsurfing or scuba diving; worked out at a fitness centre or jogged; participated in team sports; or taken part in an extreme sport (e.g., rock climbing). This suggests that health spa enthusiasts are generally in excellent physical condition and interested in energetic, strenuous outdoor pursuits. Those who are interested in visiting a health spa were also likely to have participated in team sports and to have worked out in a fitness centre or jogged, but to a lesser degree than actual spa visitors.

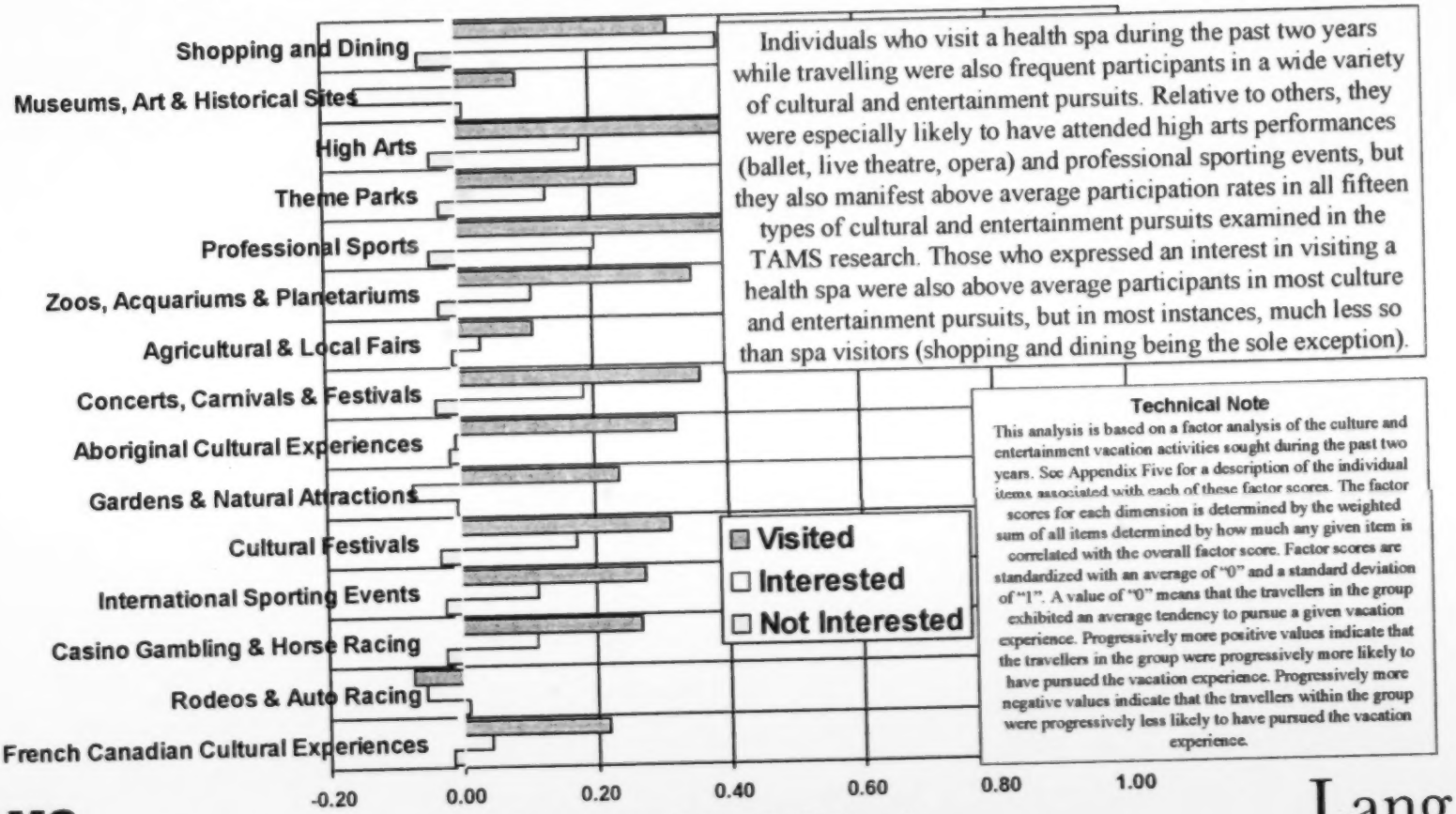
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Interest in Health Spas

Cultural and Entertainment Activities Sought during Pleasure Travel in Past Two Years

Base: Total population (18 plus) who travelled in last two years, Canada & U.S. (mailback survey)



Individuals who visit a health spa during the past two years while travelling were also frequent participants in a wide variety of cultural and entertainment pursuits. Relative to others, they were especially likely to have attended high arts performances (ballet, live theatre, opera) and professional sporting events, but they also manifest above average participation rates in all fifteen types of cultural and entertainment pursuits examined in the TAMS research. Those who expressed an interest in visiting a health spa were also above average participants in most culture and entertainment pursuits, but in most instances, much less so than spa visitors (shopping and dining being the sole exception).

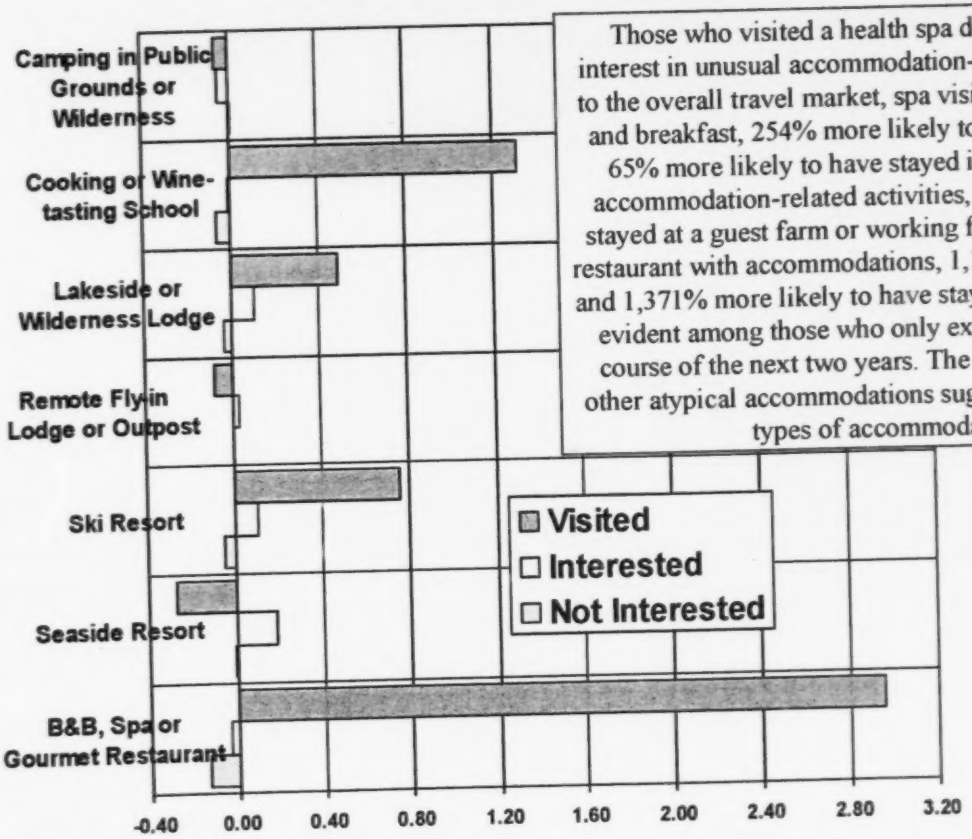
Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Interest in Health Spas

Accommodation-Related Activities Sought during Pleasure Travel in the Past Two Years

Base: Total population (18 plus) who travelled in last two years, Canada & U.S. (mailback survey)

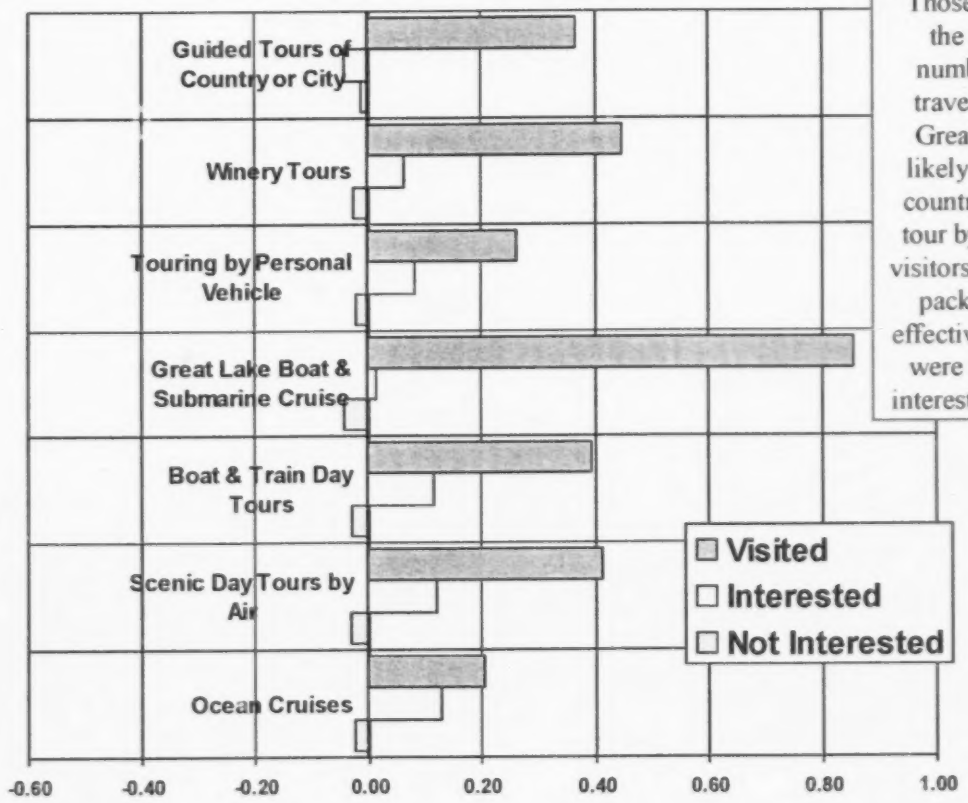


Those who visited a health spa during the past two years clearly exhibited a keen interest in unusual accommodation-related vacation experiences. For example, relative to the overall travel market, spa visitors were 151% more likely to have stayed at a bed and breakfast, 254% more likely to have stayed at a ski resort during the summer and 65% more likely to have stayed in a wilderness lodge. In terms of the more exotic accommodation-related activities, health spa visitors were 396% more likely to have stayed at a guest farm or working farm, 780% more likely to have stayed at a gourmet restaurant with accommodations, 1,133% more likely to have stayed at a cooking school and 1,371% more likely to have stayed at a wine tasting school. These patterns were not evident among those who only expressed an interest in visiting a health spa over the course of the next two years. The relationship between health spa visits and visits to other atypical accommodations suggest that cross-selling spas to visitors of these other types of accommodations is likely to be highly effective.

Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Interest in Health Spas
Day and Overnight Touring Activities Sought in Past Two Years
Base: Total population (18 plus) who travelled in last two years. Canada & U.S. (mailback survey)



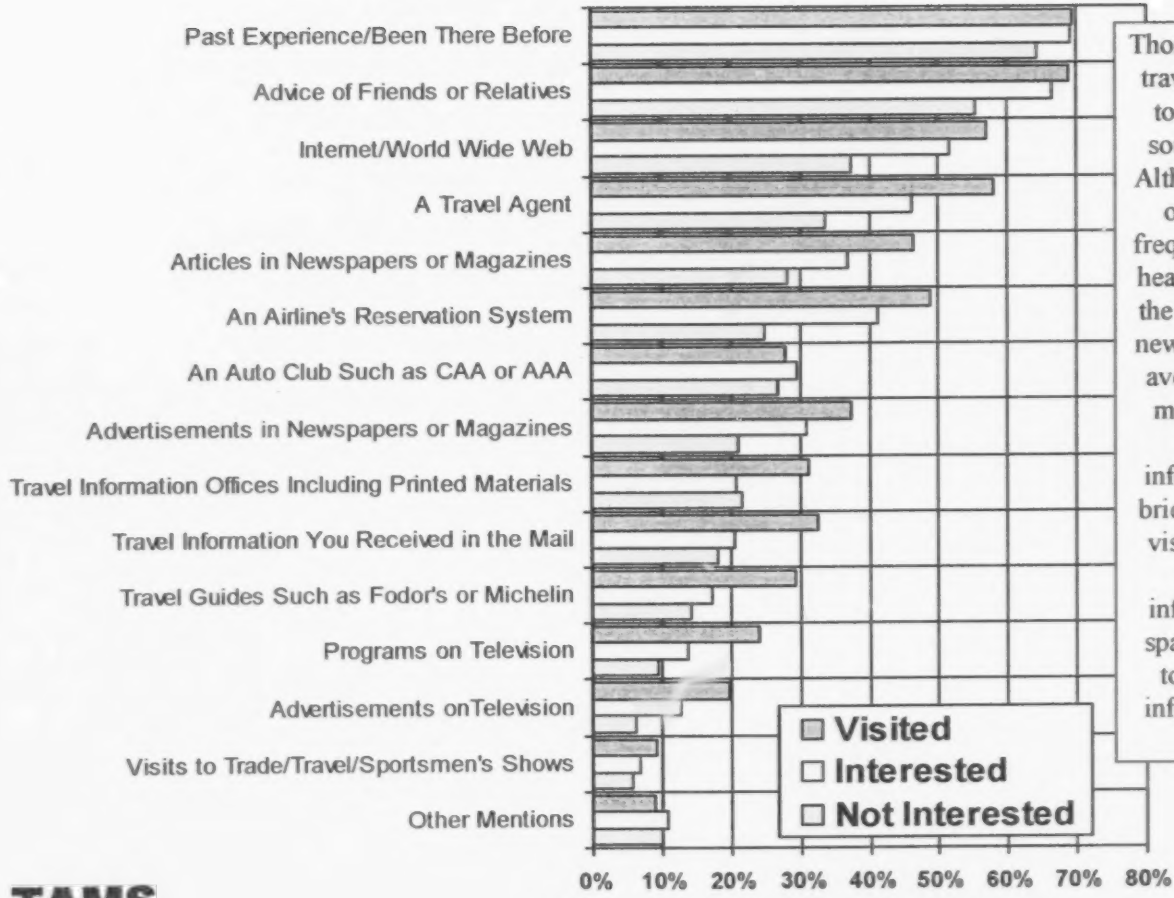
Those who visited a health spa while travelling during the past two years were also likely to have taken a number of day and overnight tours. Relative to other travellers, they were especially likely to have taken a Great Lakes or submarine cruise, but were also more likely to have taken a winery tour, a guided tour of the country or city, a boat or train day tour, or a scenic day tour by air. This again reflects the interest of health spa visitors in unusual vacation experiences and suggests that packaging health spa visits with exotic tours may be effective for this market. Note that touring activity levels were much lower among those who only expressed an interest in visiting a health spa during the next two years.

Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Interest in Health Spas
Sources of Information Consulted to Plan Brief Vacations

Base: Total population (18 plus) who travelled in last two years, Canada & U.S. (mailback survey)

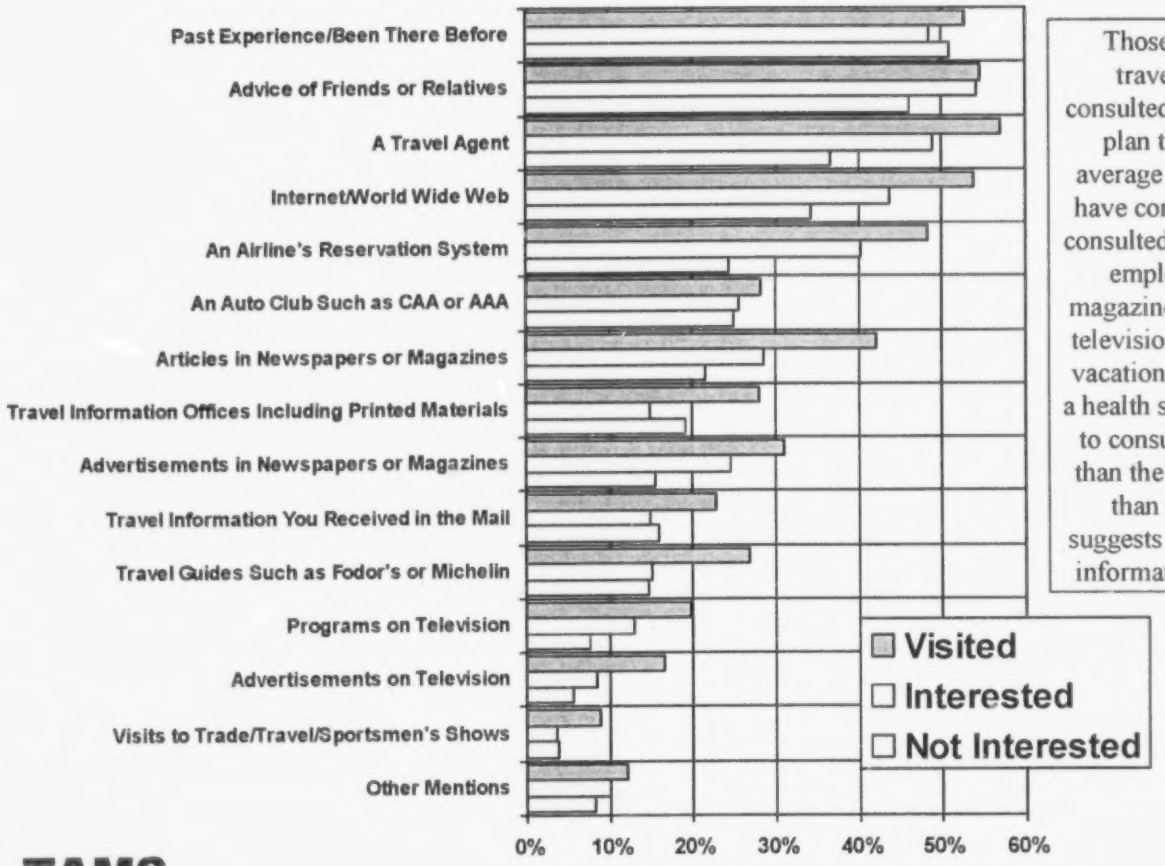


Those who have visited a health spa while travelling during the past two years tend to consult a wide array of information sources when planning brief vacations. Although past experiences and the advice of friends or relatives were the most frequently consulted information sources, health spa visitors were frequent users of the Internet, travel agents, and articles in newspapers or magazines. Relative to the average traveller, spa visitors were also more likely to use printed information obtained from travel offices and information received in the mail to plan brief vacations. Those with an interest in visiting a spa during the next two years tend to consult similar sources of information, but to a lesser degree than spa visitors. Overall, spa visitors appear to be more likely to actively seek out information to plan their brief vacations than the average traveller.

Interest in Health Spas

Sources of Information Consulted to Plan Longer Vacations

Base: Total population (18 plus) who travelled in last two years. Canada & U.S. (mailback survey)



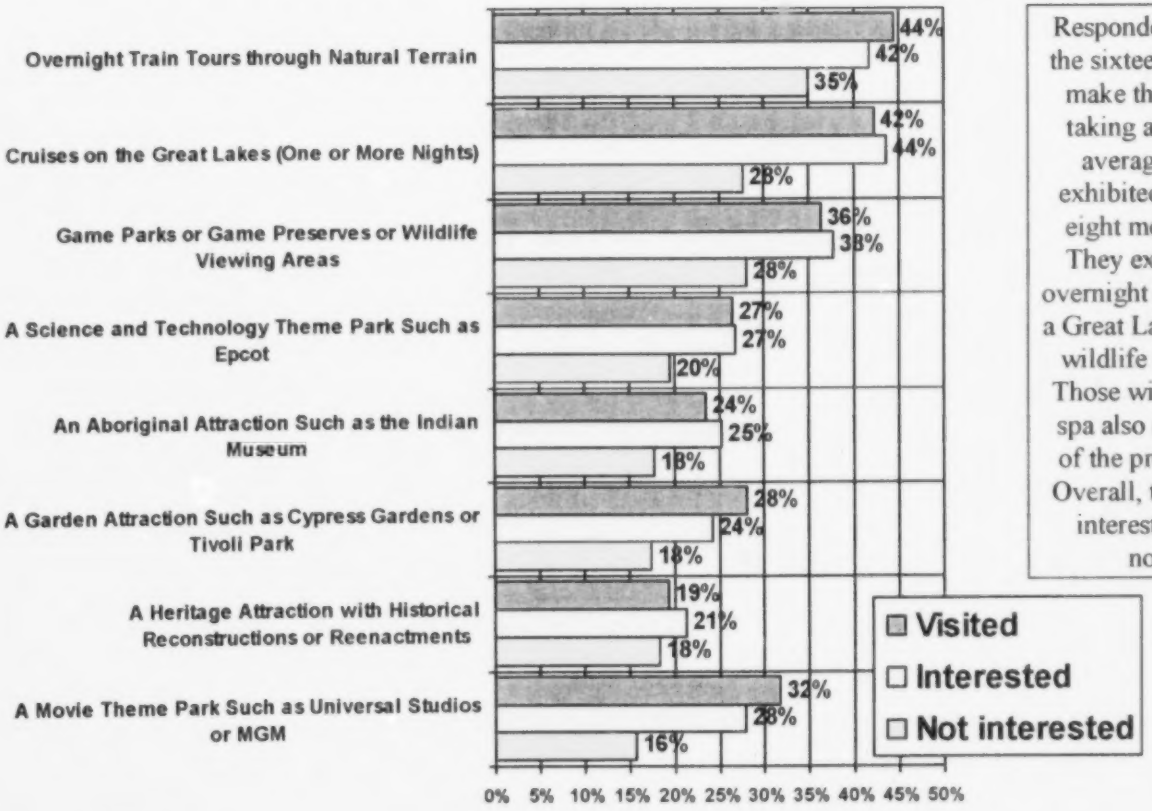
Those who have visited a health spa while travelling during the past two years also consulted a broad array of information sources to plan their longer vacations. Relative to the average traveller, they were especially likely to have consulted a travel agent, used the Internet, consulted airline reservation systems, and to have employed print materials (newspaper and magazine articles, travel guides, direct mail) and television (programs, advertising) to plan longer vacations. Those who were interested in visiting a health spa during the next two years also tended to consult a wider array of information sources than the average traveller, but to a lesser degree than spa visitors. Once again, this pattern suggests that health spa visitors actively seek out information to help plan their vacation pursuits.

Interest in Health Spas

Interest in New Tourism Products (Part One of Two)

By Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

Base: Total population (18 plus) who travelled in last two years, Canada & U.S. (mailback survey)



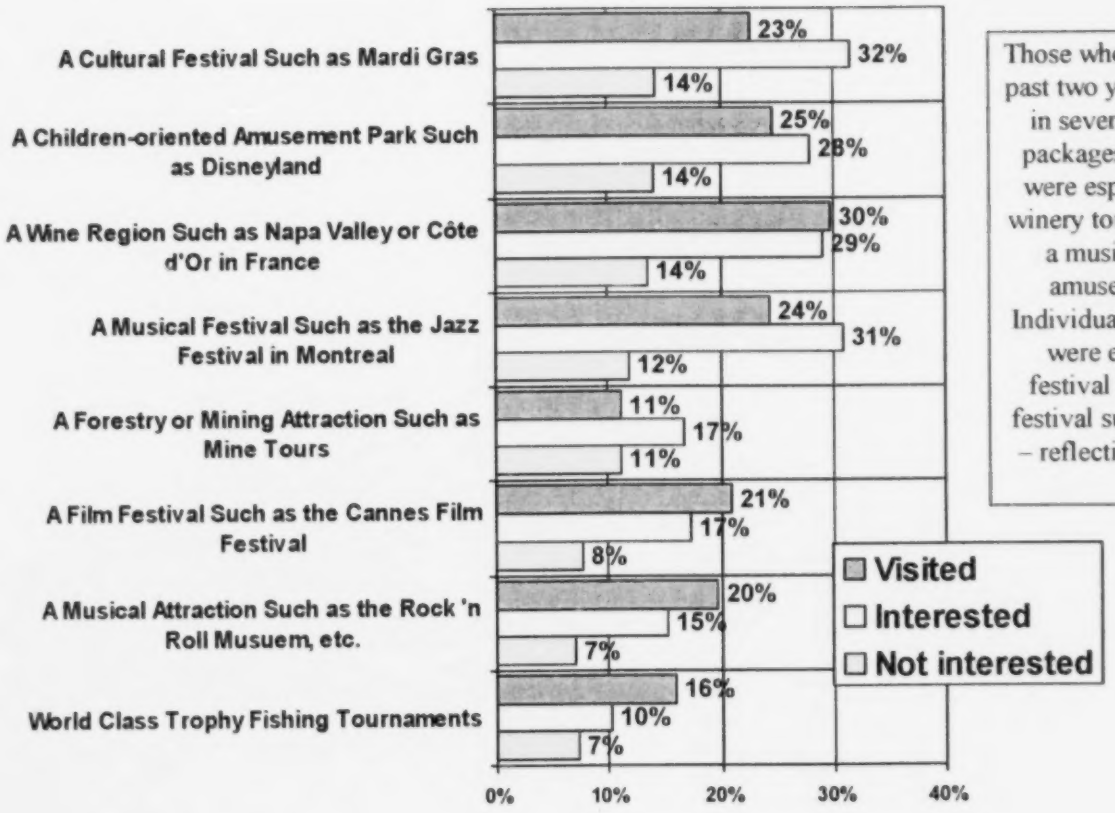
Respondents were asked whether each of the sixteen new tourism attractions would make them "A Lot More Interested" in taking a trip to Ontario. Relative to the average traveller, health spa visitors exhibited greater interest in seven of the eight more popular tourism attractions. They exhibited particular interest in an overnight train tour through natural terrain, a Great Lake cruise, a games preserve with wildlife viewing areas and theme parks. Those with an interest in visiting a health spa also exhibited above interest in most of the proposed new tourism attractions. Overall, this pattern of results reflects the interest of spa visitors in unusual and novel vacation experiences.

Interest in Health Spas

Interest in New Tourism Products (Part Two of Two)

By Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

Base: Total population (18 plus) who travelled in last two years, Canada & U.S. (mailback survey)



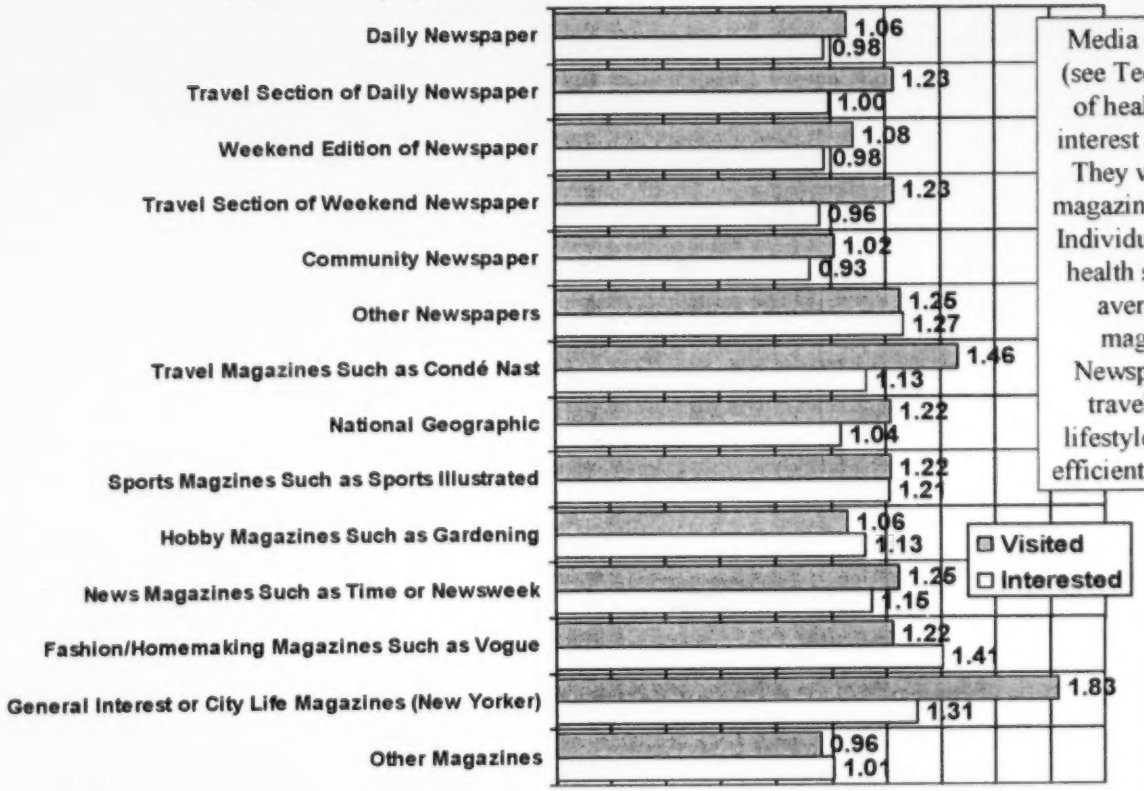
Those who had visited a health spa during the past two years also exhibited increase interest in seven of the eight less popular tourism packages. Relative to other travellers, they were especially likely to exhibit interest in winery tours, cultural, film and jazz festivals, a musical attraction and child-oriented amusement parks such as Disneyland. Individuals interested in visiting a health spa were especially interested in a cultural festival such as Mardi Gras and a musical festival such as the Jazz Festival in Montreal – reflecting the relative youthfulness of this sector of the market.

Interest in Health Spas

Media Index for Print Media: Canada and United States

By Percent Reading Each Type of Publication in General Market, among Those with an Interest in Health Spas

Base: Total population (18 plus) who travelled in last two years. Canada & U.S. (mailback survey)



Media indexing for various types of print media (see Technical Note below) suggests that visitors of health spas were more likely to read general interest or city life magazines (e.g., New Yorker). They were also above average readers of travel magazines, sports magazines and news magazines. Individuals who expressed an interest in visiting a health spa during the next two years were above average readers of fashion or homemaking magazines (e.g., Vogue) as well as "Other Newspapers" and sports magazines. Generally, travel magazines and newspapers, as well as lifestyle magazines, would appear to be the most efficient way by which to reach health spa visitors.

Technical Note

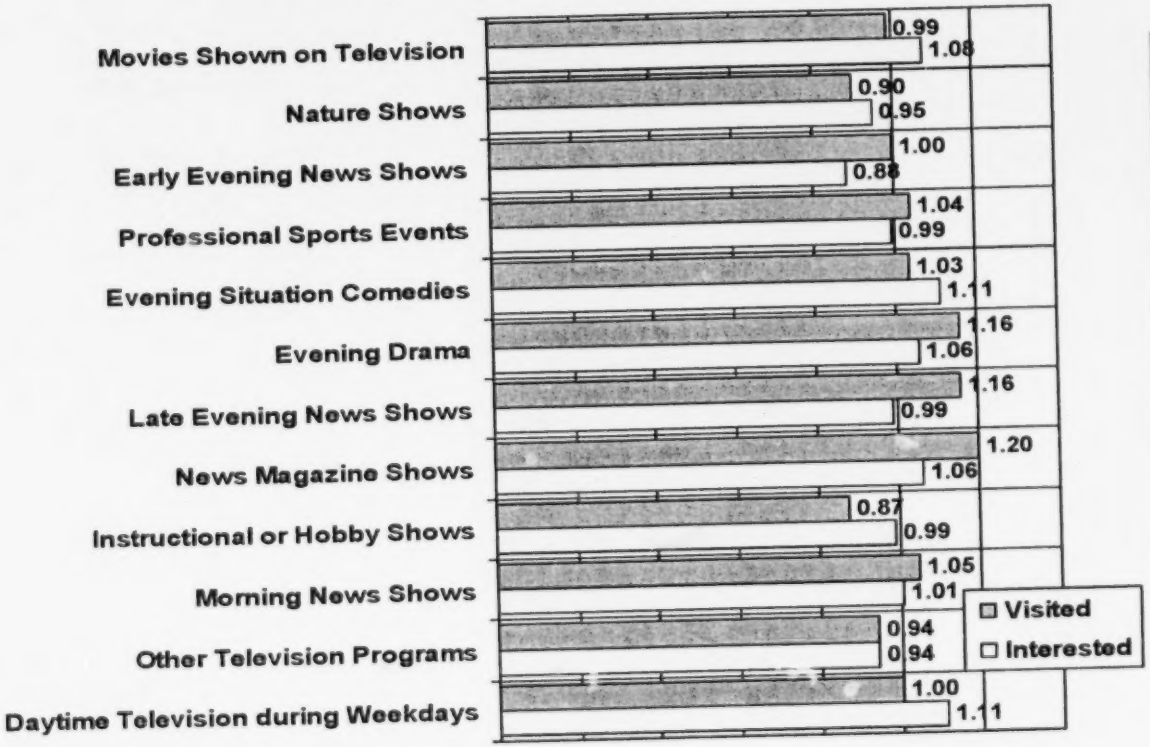
The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in downhill skiing and snowboarding were 20% more likely to read a particular publication than the general adult population.

Interest in Health Spas

Media Index for Television Programs: Canada and United States

By Percent Watching Each Type of Television Program in General Market, among Those with an Interest in Health Spas

Base: Total population (18 plus) who travelled in last two years, Canada & U.S. (mailback survey)



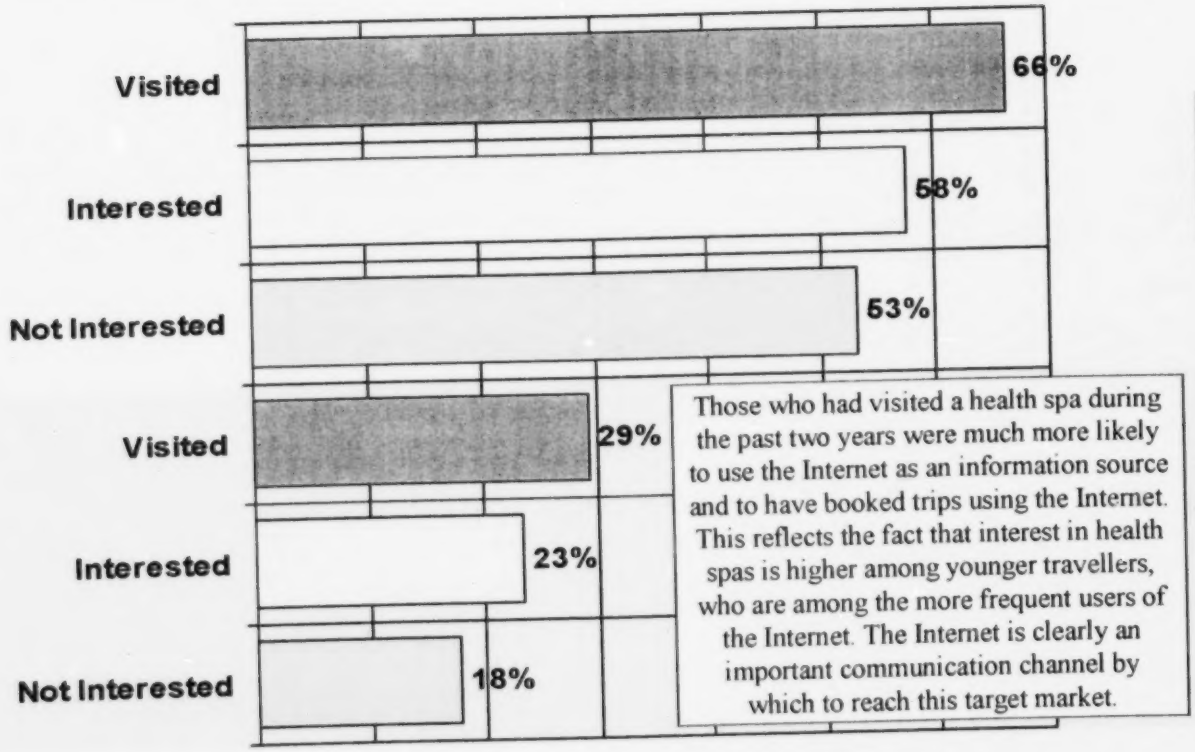
Health spa visitors were slightly more frequent viewers of news magazine shows and late evening news and drama programming. However, given the keen interest in travel related print material exhibited by health spa visitors, television is not recommended as the most efficient media channel by which to communicate with this market.

Technical Note

The Media Index is computed by dividing the percent within each segment routinely watching each show by the percent in the total market who routinely watches each show. A score of 1.0 means that viewership is the same as the total market. Index values above 1.0 indicate that the viewership is above average while index values below 1.0 indicate that viewership is below average. For example, an index value of 1.2 means that persons very interested in the news were 20% more likely to watch a particular show than the general adult population.

Interest in Health Spas
By Percent of Internet Usage for Researching or Booking at Least One Trip

Base: Total population (18 plus) who travelled in last two years, Canada & U.S. (mailback survey)


Visited
66%
Interested
58%
Not Interested
53%
Visited
29%
Interested
23%
Not Interested
18%
Research Using Internet (Any Topic)
Booked Trip Using Internet (Last Two Years)
Those who had visited a health spa during the past two years were much more likely to use the Internet as an information source and to have booked trips using the Internet. This reflects the fact that interest in health spas is higher among younger travellers, who are among the more frequent users of the Internet. The Internet is clearly an important communication channel by which to reach this target market.

Destination Image Mapping

- Technical Explanation -

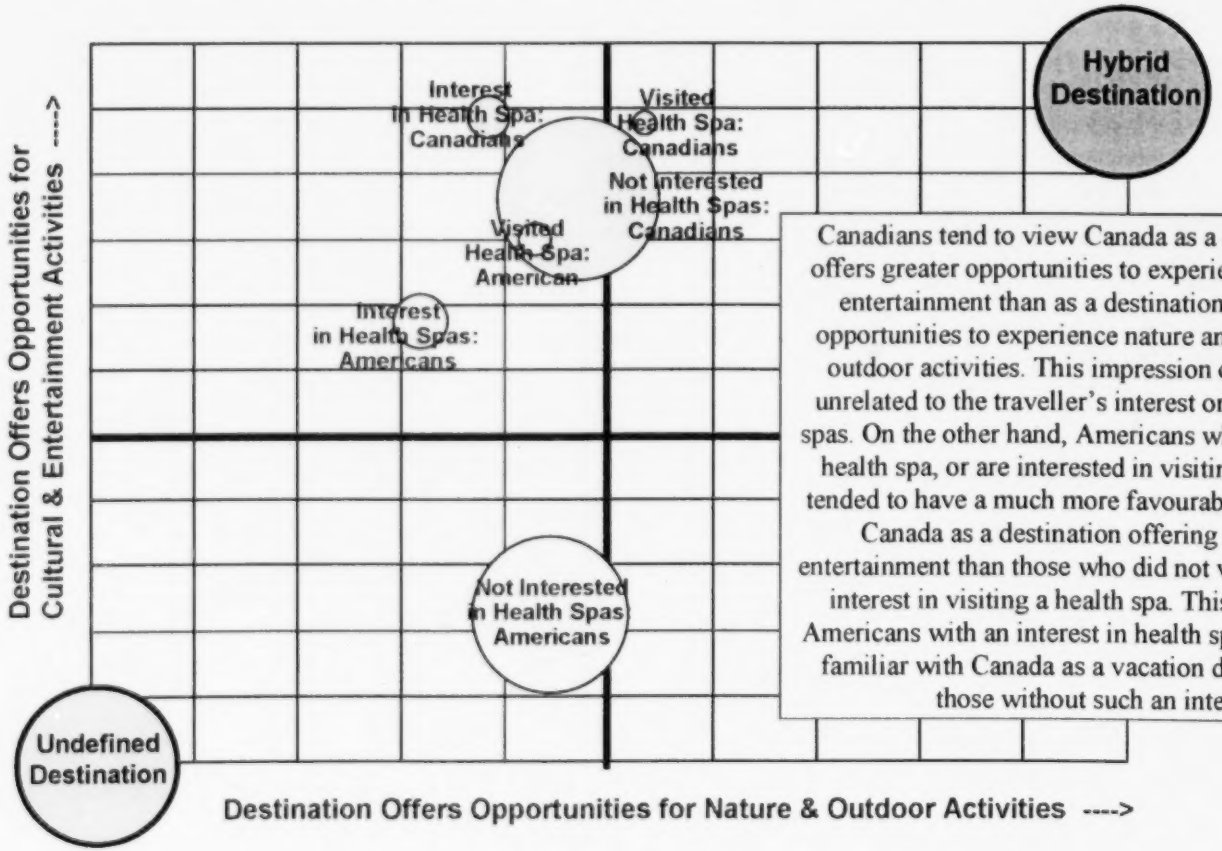
Respondents were asked to assess the image of Canada and Ontario on a ten point rating scale for 25 image attributes. These ratings were factor analyzed to identify general image dimensions upon which Canada and Ontario were evaluated (see Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellence opportunities to experience cultural and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and cultural/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

Destination Offers Opportunities for Cultural & Entertainment Activities ---->
Cultural & Entertainment Activities Only
Cultural/ Entertainment and Nature/Outdoor Activities
Hybrid Destination
Neither Cultural/ Entertainment nor Nature/Outdoor Activities
Nature & Outdoor Activities Only
Undefined Destination
Destination Offers Opportunities for Nature & Outdoor Activities ---->

Interest in Health Spas

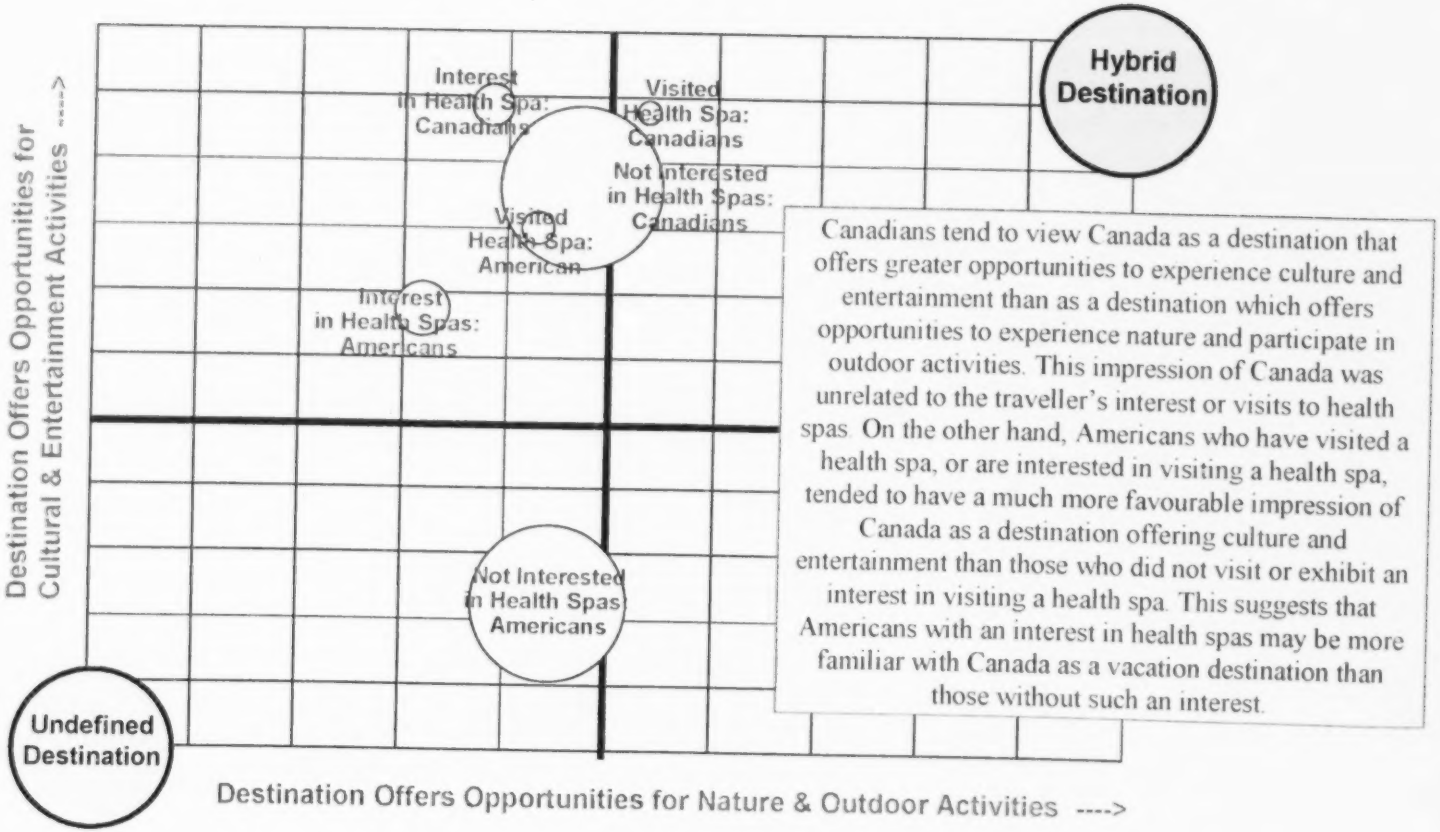
Canadian Vacation Imagery: Canada and United States

Base: Total population (18 plus) who travelled in last two years and able to rate Canada on one plus attributes, Canada & U.S. (mailback survey). Circle size denotes size of the market

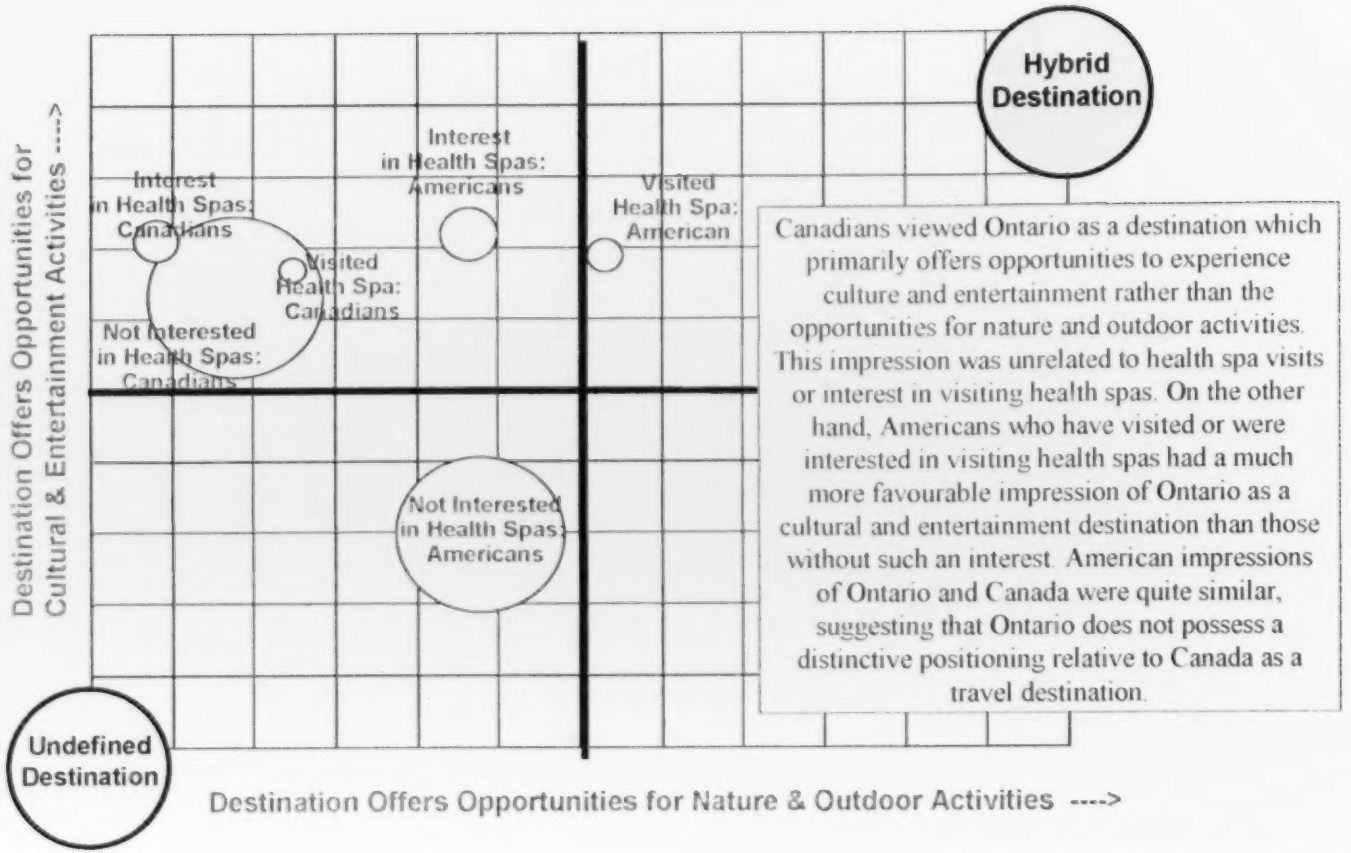

Hybrid Destination
Interest in Health Spa: Canadians
Visited Health Spa: Canadians
Not Interested in Health Spas: Canadians
Visited Health Spa: American
Interest in Health Spas: Americans
Not Interested in Health Spas: Americans
Undefined Destination
Destination Offers Opportunities for Cultural & Entertainment Activities ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->
Canadians tend to view Canada as a destination that offers greater opportunities to experience culture and entertainment than as a destination which offers opportunities to experience nature and participate in outdoor activities. This impression of Canada was unrelated to the traveller's interest or visits to health spas. On the other hand, Americans who have visited a health spa, or are interested in visiting a health spa, tended to have a much more favourable impression of Canada as a destination offering culture and entertainment than those who did not visit or exhibit an interest in visiting a health spa. This suggests that Americans with an interest in health spas may be more familiar with Canada as a vacation destination than those without such an interest.

Respondents were asked to assess the image of Canada and Ontario on a ten point rating scale for 25 image attributes. These ratings were factor analyzed to identify general image dimensions upon which Canada and Ontario were evaluated (see Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellence opportunities to experience cultural and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and cultural/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

Cultural & Entertainment Activities Only
Cultural/ Entertainment and Nature/Outdoor Activities
Hybrid Destination
Neither Cultural/ Entertainment nor Nature/Outdoor Activities
Nature & Outdoor Activities Only
Undefined Destination
Destination Offers Opportunities for Cultural & Entertainment Activities ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->


Hybrid Destination
Interest in Health Spa: Canadians
Visited Health Spa: Canadians
Not Interested in Health Spas: Canadians
Visited Health Spa: American
Interest in Health Spas: Americans
Not Interested in Health Spas Americans
Undefined Destination
Destination Offers Opportunities for Cultural & Entertainment Activities ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->

Canadians tend to view Canada as a destination that offers greater opportunities to experience culture and entertainment than as a destination which offers opportunities to experience nature and participate in outdoor activities. This impression of Canada was unrelated to the traveller's interest or visits to health spas. On the other hand, Americans who have visited a health spa, or are interested in visiting a health spa, tended to have a much more favourable impression of Canada as a destination offering culture and entertainment than those who did not visit or exhibit an interest in visiting a health spa. This suggests that Americans with an interest in health spas may be more familiar with Canada as a vacation destination than those without such an interest.

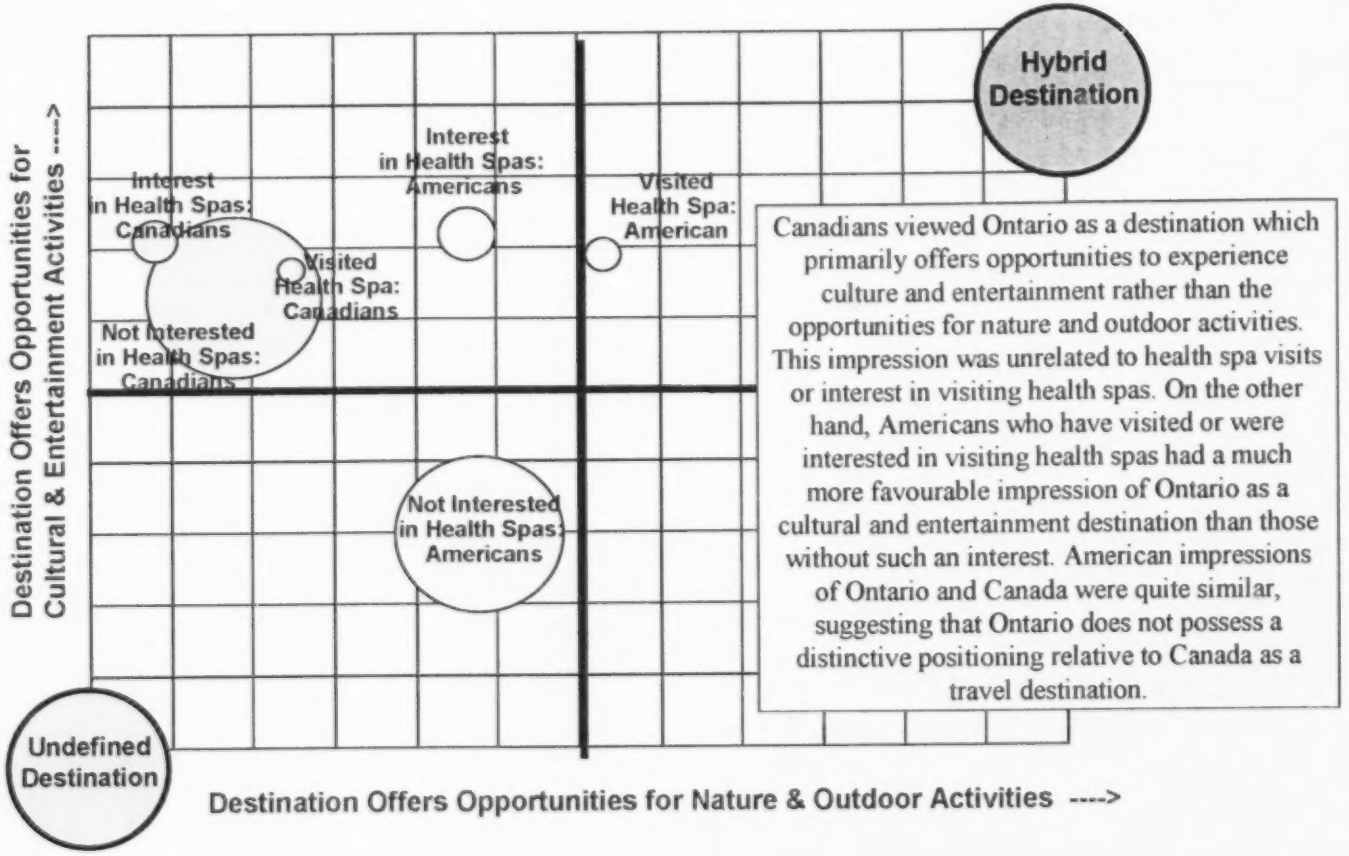

Hybrid Destination
Interest in Health Spas: Americans
Interest in Health Spas: Canadians
Visited Health Spa: American
Visited Health Spa: Canadians
Not Interested in Health Spas: Canadians
Not Interested in Health Spas: Americans
Undefined Destination
Destination Offers Opportunities for Cultural & Entertainment Activities ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->

Canadians viewed Ontario as a destination which primarily offers opportunities to experience culture and entertainment rather than the opportunities for nature and outdoor activities. This impression was unrelated to health spa visits or interest in visiting health spas. On the other hand, Americans who have visited or were interested in visiting health spas had a much more favourable impression of Ontario as a cultural and entertainment destination than those without such an interest. American impressions of Ontario and Canada were quite similar, suggesting that Ontario does not possess a distinctive positioning relative to Canada as a travel destination.

Ontario Vacation Imagery: Canada and United States

By Interest in Downhill Skiing and Snowboarding

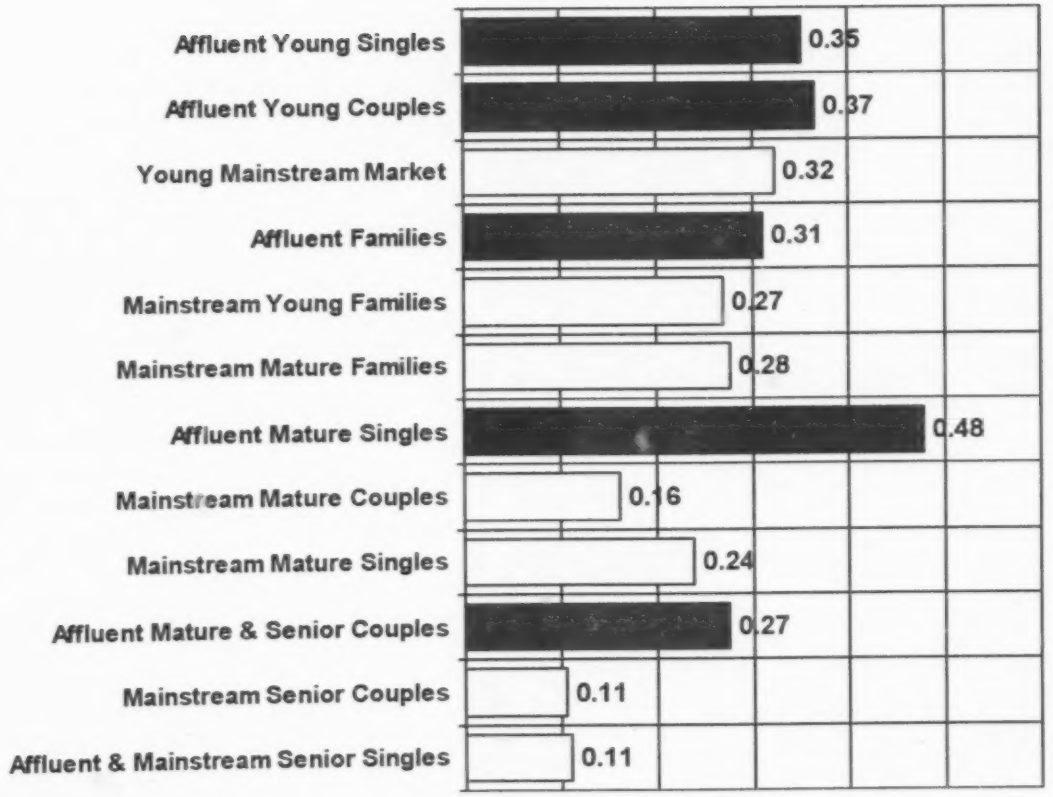
Base: Total population (18 plus) who travelled in last two years and able to rate Canada on one plus attributes, Canada & U.S. (mailback survey). Circle size denotes size of the market


Hybrid Destination
Interest in Health Spas: Americans
Interest in Health Spas: Canadians
Visited Health Spa: American
Visited Health Spa: Canadians
Not Interested in Health Spas: Canadians
Not Interested in Health Spas: Americans
Undefined Destination
Destination Offers Opportunities for Cultural & Entertainment Activities ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->

Canadians viewed Ontario as a destination which primarily offers opportunities to experience culture and entertainment rather than the opportunities for nature and outdoor activities. This impression was unrelated to health spa visits or interest in visiting health spas. On the other hand, Americans who have visited or were interested in visiting health spas had a much more favourable impression of Ontario as a cultural and entertainment destination than those without such an interest. American impressions of Ontario and Canada were quite similar, suggesting that Ontario does not possess a distinctive positioning relative to Canada as a travel destination.

Interest in Health Spas
Overall Market Potential: Canada
By Likelihood of Travel within Canada (Indexed)

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



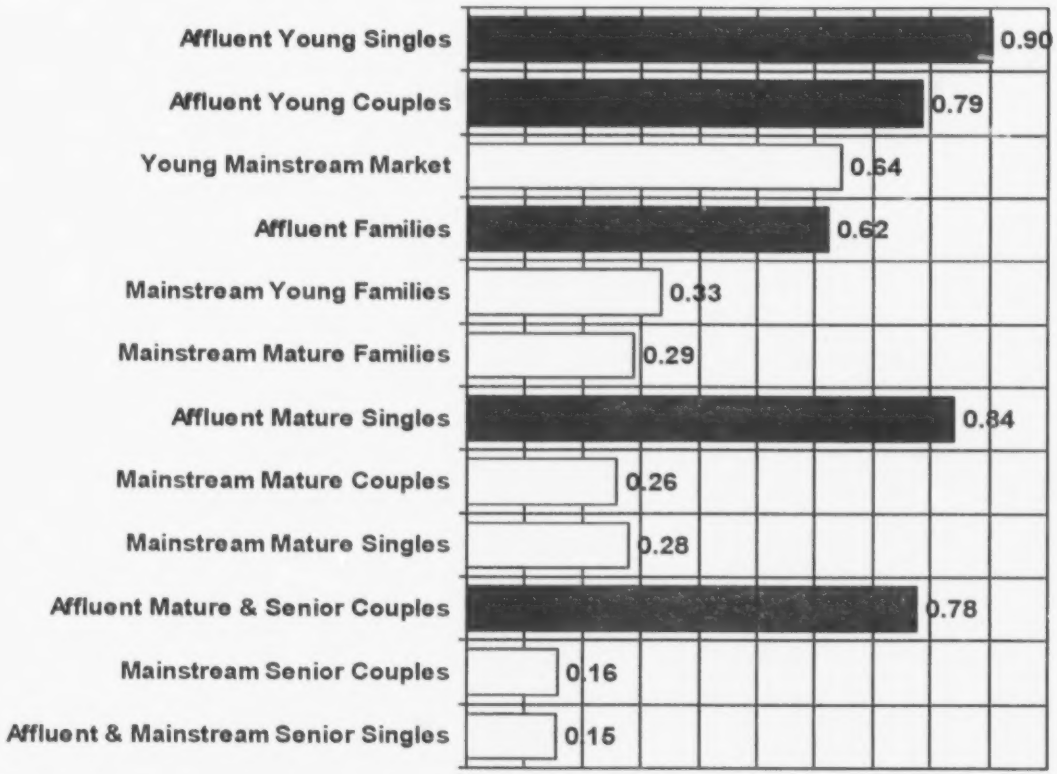
The Overall Market Potential Index is constructed to identify those segments which are most likely to be responsive to marketing, advertising and promotional initiatives designed to promote Canada's health spas. This Index indicates that in Canada, the Affluent Mature Singles represent the prime target market for such initiatives. Affluent Young Singles and Affluent Young Couples represent important secondary target markets for health spa promotional activity.

Technical Note

The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in health spa vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential, and values below 1.0 reflect below average market potential.

Interest in Health Spas
Overall Market Potential: United States
By Likelihood of Travel To Canada (Indexed)

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



The Overall Market Potential Index for the United States shows a similar pattern as that observed for Canada. In the United States, the Affluent Young Singles and the Affluent Mature Singles represent the most important target groups for health spa promotional activities. However Affluent Couples and Affluent Mature and Senior Couples are also important secondary markets and likely to be responsive to such initiatives.

Technical Note

The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in health spa vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential, and values below 1.0 reflect below average market potential.